PhatNotes™ Professional Edition Version 4.7

USER'S GUIDE

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PhatNotes 4.7 Professional Edition User's Guide

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PhatWare® Corp.

530 Showers Drive Suite 7 #333
Mountain View, CA 94040-1457
USA

Telephone: (650) 559-5600

Web: www.phatware.com

Support: support-2@phatware.com

Sales: sales@phatware.com

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General Features

Overview

PhatNotes Professional Edition is a powerful notes organizer for Microsoft Windows Powered Pocket PC and Desktop PC, and Palm devices. You can create notes providing them with category, subject, creation and modification date, which helps to find required information quickly and easily. With PhatNotes you can search for specific text in a specific field and sort notes by category, date, or subject. You can protect notes from unauthorized access with a password and send e-mail messages directly from the Note Editor. Interface to the Contacts Database enables you to pick an e-mail address instead of typing it in. PhatNotes uses a compressed database, saving limited storage space. The intuitive, easy user interface lets you start using the program within minutes. PhatNotes Professional Edition allows synchronizing multiple notes databases between the desktop PC and mobile device.

The new version offers many new advanced features including rich text editing and formatting, file attachments, hyperlinks between notes, multiple notes database support with tree-like views, hierarchical notes organizer, integration with PhatPad, customizable views, user reminders, voice note attachments, support for Palm OS devices, and more.

PhatNotes Professional Edition includes a setup program that runs on your desktop computer and makes installation of the program very easy.

System Requirements

Microsoft Windows Mobile powered Pocket PC (optional)

- Microsoft Windows Mobile Powered Pocket PC 2003/2003SE/2005 or Pocket PC 2003/2003SE/2005 Phone Edition.
- Microsoft Windows Mobile 4.2 or later.
- Approximately 950KB of free storage space depending on device model
- Additional storage space is required by the notes database, depending on the size and quantity of notes entered into the database. We recommend you to have at least 100K of storage space for the notes database.

Palm OS powered device (optional)

- Palm Desktop Software version 4.0 or later (4.1 or later recommended)
- Palm OS-powered device, such as Palm n505, Palm V, Palm VII, Sony Clie, etc.
- Palm OS version 4.0 or later.
- 160K of free storage space for application
- Additional storage space is required for notes database, depending on the size and quantity of notes entered into notes databases. We recommend that you have at least 100K of free storage space for notes databases.

Desktop PC

- Personal, Multimedia or portable computer with Pentium Pro 200MHz or better processor.
- Windows NT 4.0 Workstation or Server with Service Pack 6, or Windows 98, Windows ME, Windows 2000 Server/Professional, or Windows XP Home/Professional.
- 25MB of free disk space for full installation, an additional 25MB required for temporary files during installation.
- 64 MB of memory to use on Windows 98/ME/Windows NT 4.0 (128 recommended)
- 128 MB of memory to use on Windows 2000/Windows XP
- Super VGA, 16-bit color or better video adapter.
- Microsoft Mouse or compatible pointing device.
- Microsoft Internet Explorer 6.0 or later.

Installation

This section provides instructions on how to install, register, upgrade, and uninstall PhatNotes Professional Edition on your system. Please read these instructions carefully, before installing PhatNotes.

Installing PhatNotes

1. If you have a mobile device, synchronize your mobile device with the desktop PC and make a full backup of your data.
2. Remove any previous version of PhatNotes from the mobile device and the desktop PC.
3. Run PhatNotes installation file PhatNotespro.exe.
4. Follow the on-screen installation instructions to install PhatNotes on your desktop PC.
5. When the desktop portion of the installation is finished, synchronize your mobile device with the desktop PC to install the device components and synchronize the notes database.

> **Note:** You must have administrator user rights to install PhatNotes on Windows NT 4.0, Windows 2000/XP.

By default, PhatNotes will be installed in the **\Program Files\Accessories** directory on the mobile device. Shortcuts will be created in the **\Windows\Programs** directory and on the desktop. To run PhatNotes, just double-click on the PhatNotes icon on your desktop.

Registering PhatNotes

Note: You must register on both, desktop and device independently. Registration code is not transferred to the device during synchronization.

On the Pocket PC

When you run PhatNotes on the Pocket PC for the first time, the Register dialog box will appear. Enter the provided serial number into the Serial Number field and tap Register Now. If you downloaded the PhatNotes trial version and don't have a serial number, leave this field blank and tap Register Later.

On the Desktop PC

Use the *Help/Register PhatNotes* command to register the software.

You can also register PhatNotes on our web site at **www.phatware.com/index-buy.html.**

You also can click on the **How to Register** button, which will display this page in your default Internet Browser.

Upgrading PhatNotes

1. Disconnect the mobile device from the Desktop PC.
2. Uninstall any previous version of PhatNotes from the Desktop PC and mobile device and (see "Removing PhatNotes" section below for more information).
3. Connect mobile device to the Desktop PC (use a guest account if you have deleted an old partnership).
4. Run **phatnotespro.exe** installation program on the Desktop PC.
5. Follow the on-screen installation instructions to install PhatNotes.

Installing PhatNotes on Multiple Pocket PCs

You can install or reinstall PhatNotes on multiple Pocket PCs once it is installed on the Desktop PC without running setup program again. During the installation on your Desktop PC, PhatNotes setup will create a batch file **install.bat** in the target PhatNotes folder, and corresponding icons in the PhatNotes program group. To install or reinstall PhatNotes on the Pocket PC, simply run the **install.bat** file and follow on-screen instructions.

Removing PhatNotes

From the Palm Device

1. Tap the **Home** icon
2. Tap the **Menu** icon
3. Select the **Delete** item from the **App** menu
4. Select the **PhatNotes** entry from the programs list and tap the **Delete** button

From the Pocket PC

1. **Disconnect** the Pocket PC from the Desktop PC (if connected).
2. Choose the **Settings**/**Remove Programs** item from the **Start** menu to run **Control Panel**.
3. When the **Remove Programs Properties** dialog box appears, locate the **PhatWare PhatNotes** entry in the list box and tap on it to **select**.

4. Tap the **Remove** button to remove the PhatNotes application from your Pocket PC.

> **Note:** Setup will prompt you if you want to delete the PhatNotes database from the Pocket PC. If you want to keep the database, tap NO.

From the Desktop PC

1. Choose **Settings / Control Panel** menu item from the **Start** menu to run **Control Panel**.
2. Double-click on Add/Remove program icon.
3. In the Add/Remove Program Properties dialog box, select PhatNotes Professional Edition entry in the Programs list box and press Add/Remove button.
4. Follow the on-screen instructions to complete uninstallation.

Synchronizing Notes

PhatNotes Professional Edition allows a user to synchronize multiple notes databases between the mobile device and the desktop PC. After you install PhatNotes, the PhatNotes synchronization module will be added to the ActiveSync/HotSync (for Palm Devices) synchronization services and will be configured to synchronize all notes databases. When a user creates a new notes database on the mobile device or on the desktop PC, it will be automatically added to the databases list but won't be synchronized until it contains at least one note.

> **Note:** If you create a new empty database in PhatNotes on the desktop or the device, it will not synchronize until it has at least one note.

The PhatNotes synchronization module is an add-on for ActiveSync/HotSync. It works like native ActiveSync/HotSync synchronization services such as for Contact, Appointments, To Do List, etc. Notes will be synchronized automatically when you synchronize your mobile device with the desktop PC. PhatNotes supports ActiveSync 3.0 or later or HotSync 4.0 or later for Palm devices. However, for better results we strongly recommend using ActiveSync 3.5 build 12007 or later. You can find the latest information about ActiveSync on the Microsoft web site www.pocketpc.com. For Palm devices, PhatNotes supports HotSync 4.0 or later.

ActiveSync PhatNotes Entry

After you install PhatNotes on your desktop PC and Pocket PC (see "Installing PhatNotes" section), the **PhatNotes** entry will be added to the **Synchronization Services** section of the **Options** dialog box (see figure 1). You can access this dialog box by double-clicking on the ActiveSync icon on your Taskbar tray, and choosing the **Tools/Options** menu item of the **Microsoft ActiveSync** window. (The ActiveSync icon does not need to be active to access this window.) If you want to disable PhatNotes synchronization, simply uncheck the box next to the **PhatNotes** entry. To enable PhatNotes synchronization, check this box again.

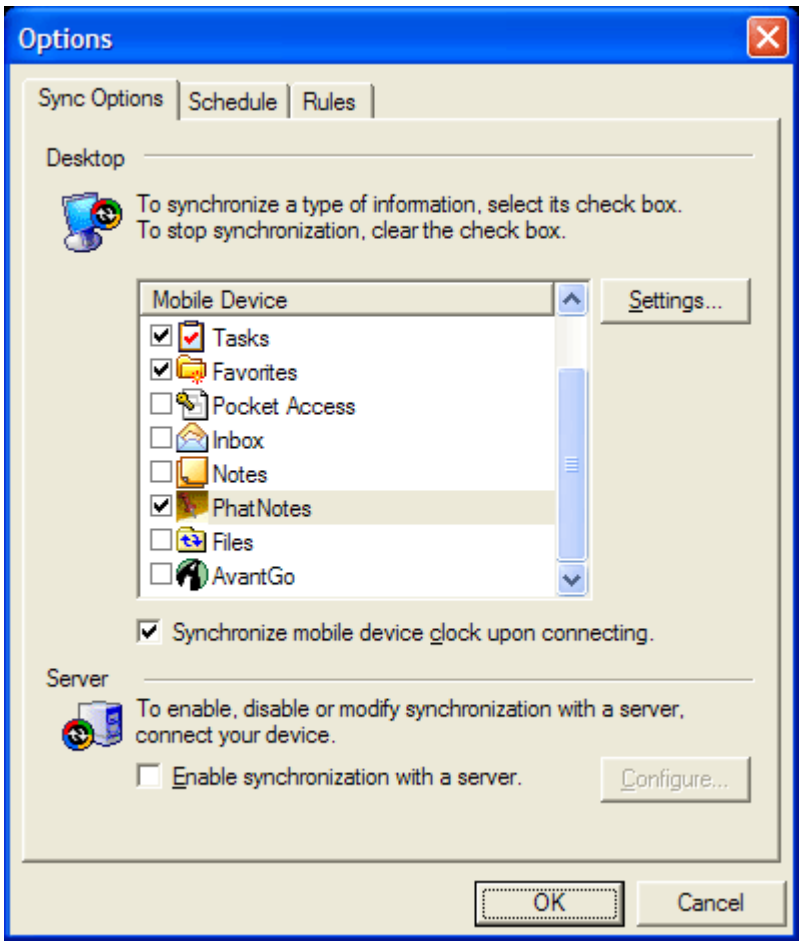

Figure 1. ActiveSync Options dialog box.

If you want to modify PhatNotes synchronization settings, select the **PhatNotes** entry and click the **Settings** button. The **PhatNotes Synchronization Options** dialog box will appear (see figure 2).

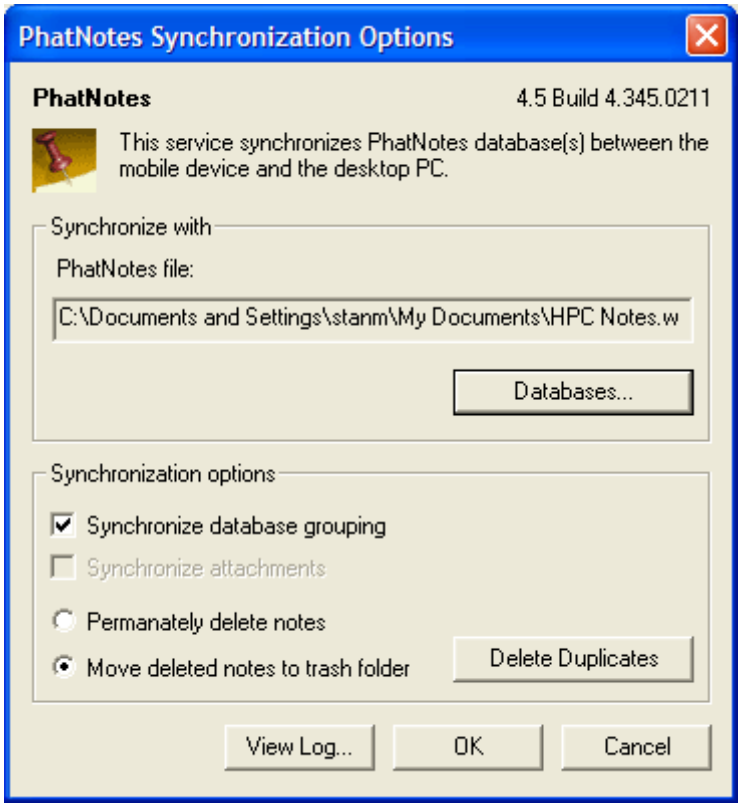

Figure 2. ActiveSync PhatNotes Synchronization Options dialog box.

Using this dialog box, you can synchronize the database groupings, attachments (if activated – see Appendix 5 for limitations), and the actions to take when notes are deleted. You can also choose which databases to synchronize with the Pocket PC. To do so, click the **Databases** button. The **Synchronize Notes Databases** dialog box will appear (see figure 3). To disable synchronization of one or more databases, uncheck the corresponding check box. For changes to take effect, reconnect your Pocket PC.

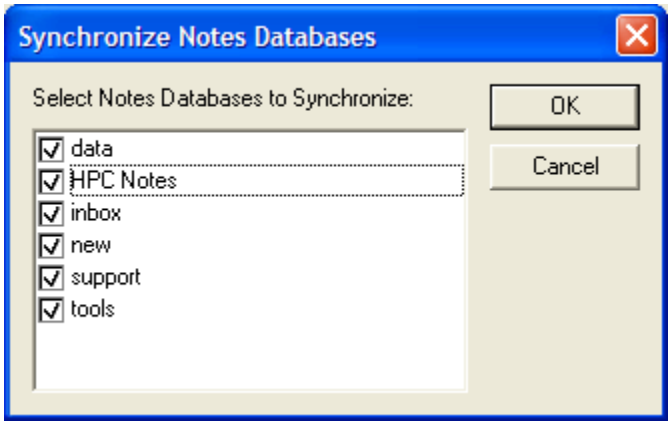

Figure 3. ActiveSync PhatNotes Synchronize Notes Databases dialog box.

HotSync PhatNotes Entry

After you install PhatNotes on your desktop PC and Palm device (see "Installing PhatNotes" section), the **PhatNotes** entry will be added to the **Conduit** list **Custom** dialog box (see figure

4). You can access this dialog box by clicking on the HotSync icon on your Taskbar tray, and choosing the **Custom** menu item.

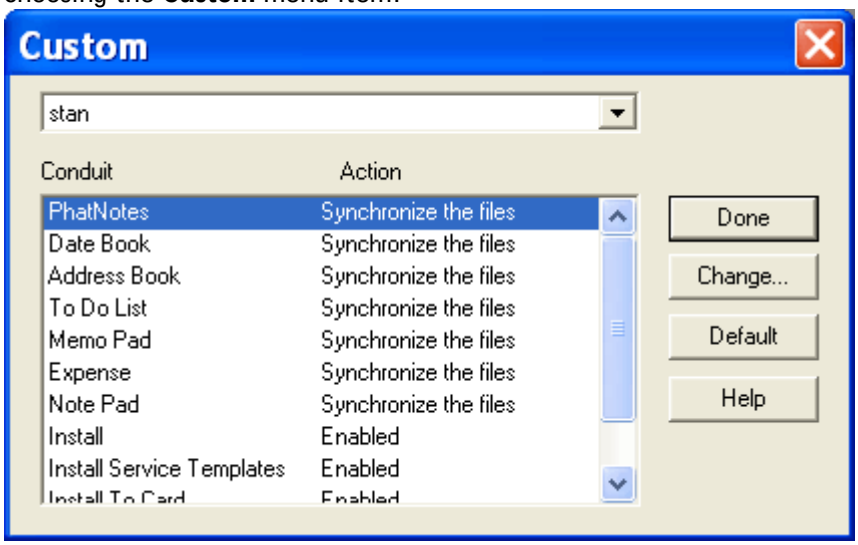

Figure 4. HotSync Custom dialog box.

If you want to disable PhatNotes synchronization, highlight the **PhatNotes** entry, and click on **Change**. The Configure PhatNotes HotSync dialog box will appear (see figure 5). Click on the **Do nothing** button. To enable PhatNotes synchronization, click on the **Synchronize the notes** button.

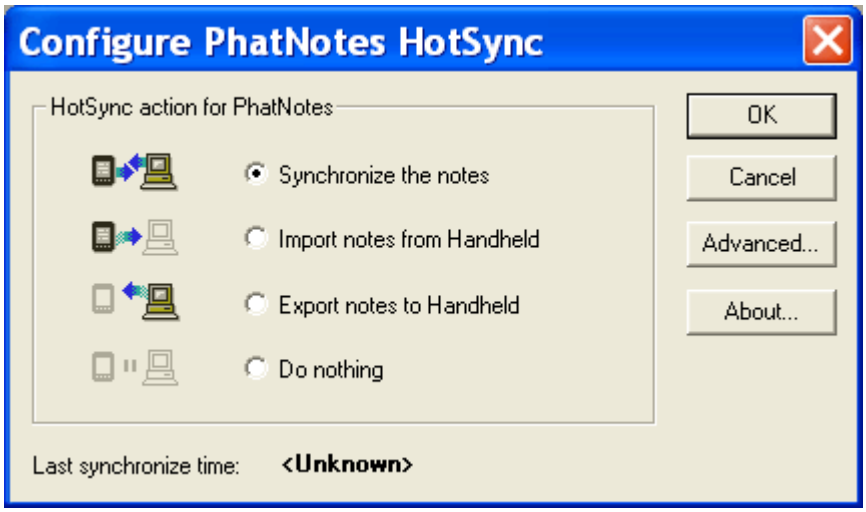

Figure 5. HotSync Configure PhatNotes dialog box.

If you want to modify PhatNotes synchronization settings, from the Configure PhatNotes HotSync dialog box, click the **Advanced** button. The **Advanced Options** dialog box will appear (see figure 6).

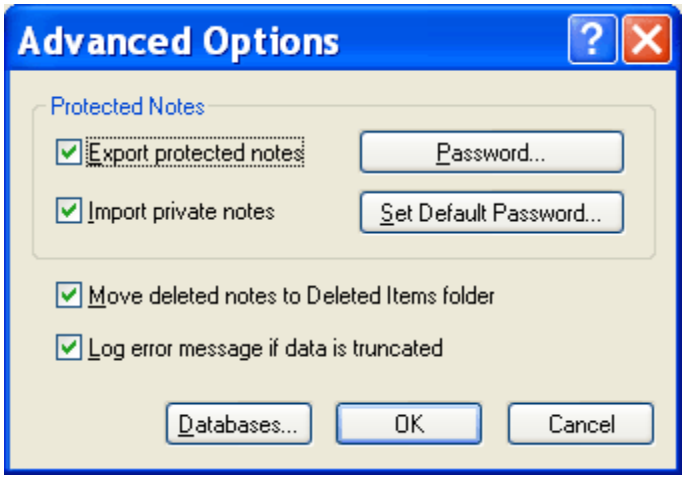

Figure 6. HotSync Advanced Options dialog box.

Using this dialog box, you can choose how to deal with protected notes and the actions to take when notes are deleted. You can also choose which databases to synchronize with the Palm device. To do so, click the **Databases** button. The **Databases** dialog box will appear (see figure 7). To disable synchronization of one or more databases, uncheck the corresponding check box. You can also decide how to treat new databases that reside only in one location. For changes to take effect, reconnect your Palm device.

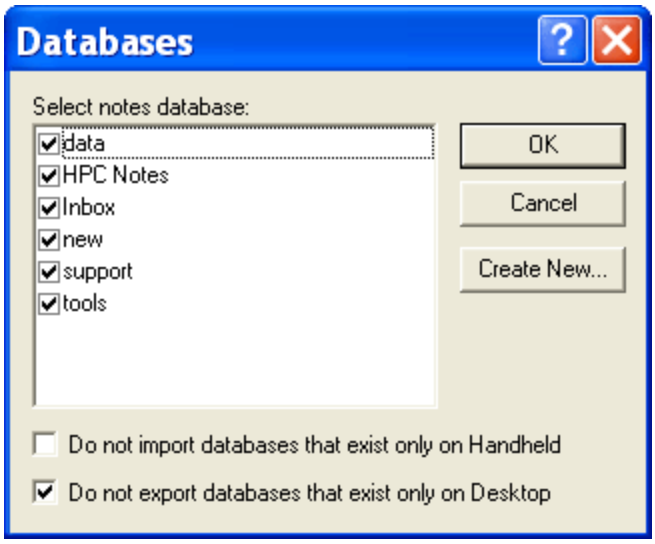

Figure 7. HotSync Databases dialog box.

Synchronizing PhatNotes attachments (Pocket PC)

PhatNotes attachments synchronization is disabled by default and is not recommended because of some limitations (see readme file). Please read the following instructions carefully, before enabling the attachments synchronization.

1. Make sure that the files synchronization is enabled in ActiveSync. If not, you must enable the files synchronization first. To do so, click the **Options** button in the **ActiveSync** window, check the box in front of the **Files** information type, and then click **OK**. It is

necessary to enable files synchronization because PhatNotes sync provider does not synchronize attached files themselves, it only synchronizes references to files.

2. On the device, all PhatNotes attachments must be stored in the **\My Documents** folder or its subfolders. ActiveSync will synchronize only filed located in this folder (or its subfolders). **Do not attach files located outside \My Documents folder.**
3. On the desktop PC, all PhatNotes attachments must be stored in the sync folder corresponding to the connected device. You can view the full path to this folder in the ActiveSync **File Synchronization Settings** dialog box (note that the dialog box does not allow changing this folder). Because this folder is unique for each ActiveSync partnership, it is possible to synchronize PhatNotes attachments with one Pocket PC only. **If you synchronize more than one Pocket PC with your desktop PC, do not enable synchronization of PhatNotes attachments.**
4. Once all of the above requirements are met, you can enable the attachments synchronization for PhatNotes. To do so, check the **Synchronize attachments** box in the **PhatNotes Synchronization Settings** dialog box. Note that if you already had notes with attachments before you enabled the attachments synchronization, you need to modify these notes to force the synchronization.

Deleting/renaming notes database (Pocket PC)

While the mobile device is connected and ActiveSync is running, all notes databases on the desktop PC are locked. Before deleting or renaming a notes database, you must disconnect your mobile device, if connected. Then you will be able to delete/rename a notes database on the desktop PC. During the next synchronization session ActiveSync will attempt to delete/rename the corresponding database from on the mobile device. However, if the deleted (renamed) database is in use on the device, ActiveSync will fail to delete the old database, leaving an empty database on your device. If this situation occurs, you need to delete the old database manually. For more information about multiple notes databases, see the "Working with Databases" section of this manual.

Resolving Synchronization Conflicts (Pocket PC)

Synchronization conflicts occur when a previously synchronized note has been modified on both the desktop PC and the Pocket PC. You can resolve conflicts by indicating whether you want to retain the data from the desktop PC or the Pocket PC.

Resolving ActiveSync Conflicts

To specify conflict resolution rules, switch to **Rules** property sheet of the **ActiveSync Options** dialog box shown on figure 8. These rules apply to all the synchronization services, including notes synchronization.

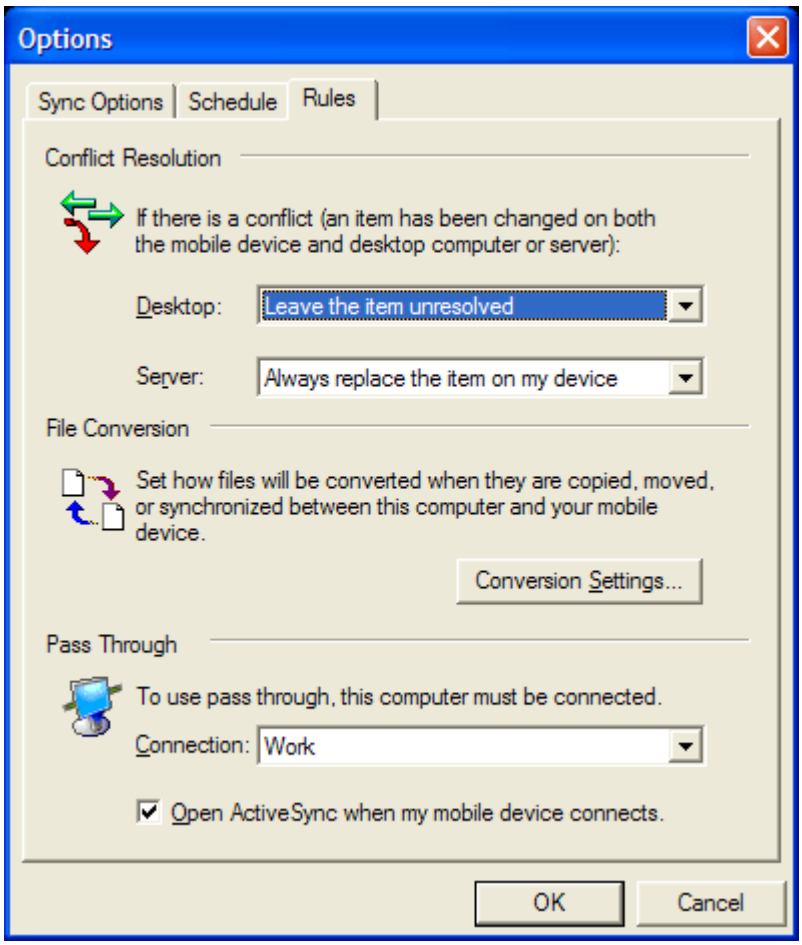
Options
Sync Options
Schedule
Rules
Conflict Resolution
If there is a conflict (an item has been changed on both the mobile device and desktop computer or server):
Desktop:
Leave the item unresolved
Server:
Always replace the item on my device
File Conversion
Set how files will be converted when they are copied, moved, or synchronized between this computer and your mobile device.
Conversion Settings...
Pass Through
To use pass through, this computer must be connected.
Connection:
Work
Open ActiveSync when my mobile device connects.
OK
Cancel

Figure 8. ActiveSync Rules dialog box.

Note: If you have any problems synchronizing notes between your desktop PC and the Pocket PC, see "Appendix 2 Synchronization Troubleshooting Guide."

Resolving HotSync Conflicts

To specify conflict resolution rules, go to the Custom dialog box shown on figure 4, highlight the **PhatNotes** entry, and click on **Change**. The Configure PhatNotes HotSync dialog box will appear (see figure 5 in the HotSync PhatNotes Entry section, above). Either click on the **Import notes from Handheld** or **Export notes to Handheld** button.

PhatNotes support for Windows Mobile 5.0

PhatNotes has been updated to support Windows Mobile 5.0 (Pocket PC 2005 and Smartphone 2005 devices) new features, such as soft-key menus, contact picker and picture selector.

Menus

For UI consistency, PhatNotes supports new soft-key style menus on Pocket PC 2005 devices. However, the application allows a user to change menu appearance by selecting the **Menu/View/Classic Menus** or the **View/Soft Keys Menus** command, depending on the user's preference (see figures 9 and 10).

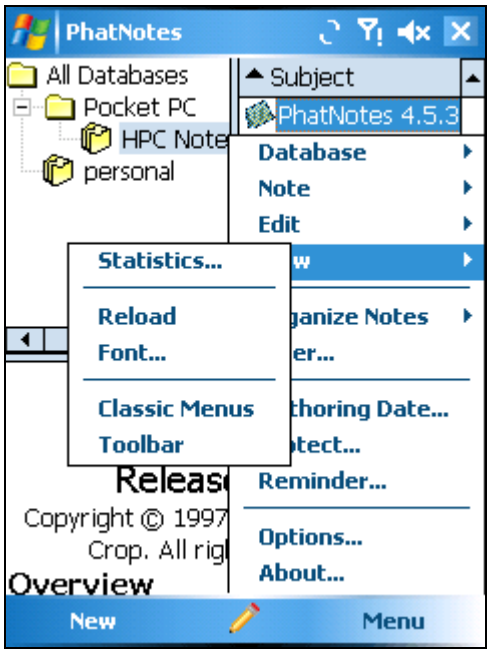

Figure 9. PhatNotes soft-keys menus

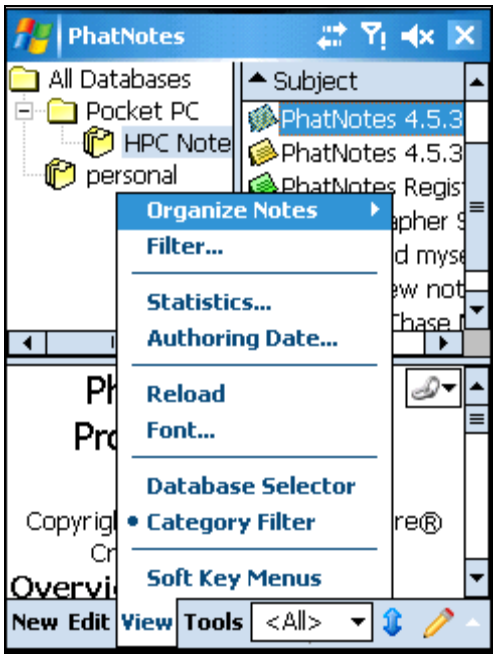

Figure 10 PhatNotes "classic" menus

Contact Picker

PhatNotes uses the standard **Contact Picker** window to select the contact information when inserting the contact information into the note's body (the **Insert/Contact** menu command) or when selecting email addresses in the **Send Mail** dialog box (see figure 11).

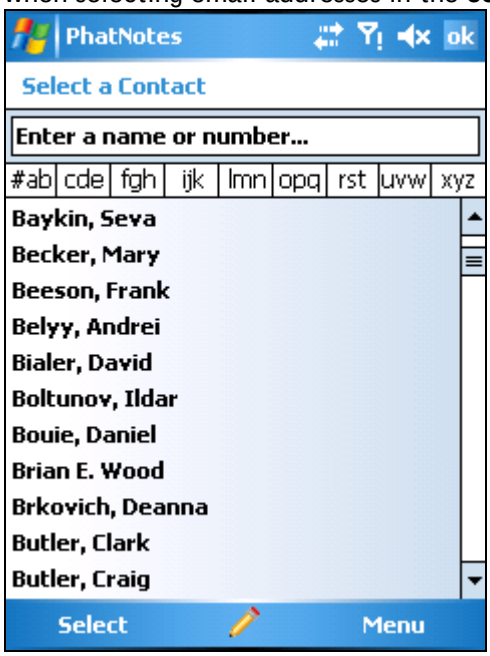

Figure 11. Contact Picker dialog box

Picture Selector

When running on Pocket PC 2005 devices, PhatNotes has the new **Insert/Picture** menu command. It is similar to the **Insert/File** menu command, but displays the **Picture Selector** dialog box which allows you to preview an image before inserting it into the note or take a new picture with a built-in camera (if present) (see figure 12).

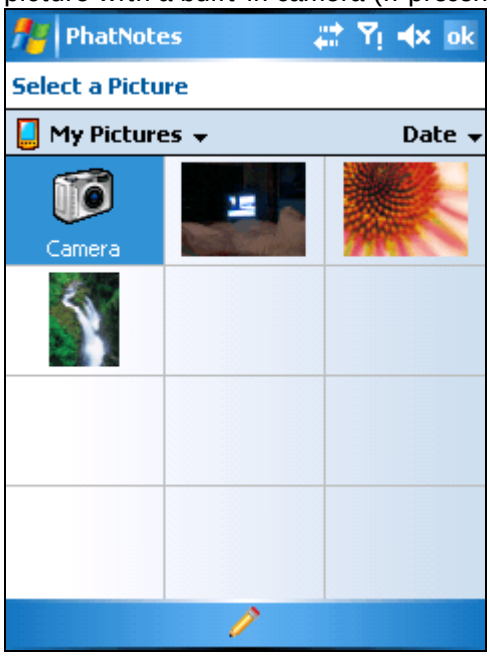

Figure 12. Picture Selector window used to insert a picture into a note.

Pocket PC Features

The PhatNotes main screen is shown on figure 13. It contains the command bar, the note list view, the status bar, and note preview. You can toggle appearance of the status bar and note preview using **View/Status Bar** and **View/Note Preview** menu commands. When running the application for the first time the note list view will be empty. After you begin creating notes, they will appear in the list view. The list view header displays the field's names and also can be used to sort notes (see "Sorting and filtering notes" section) or adjust the size of the columns. To change the size of a column, tap and drag the divider in the column heading.

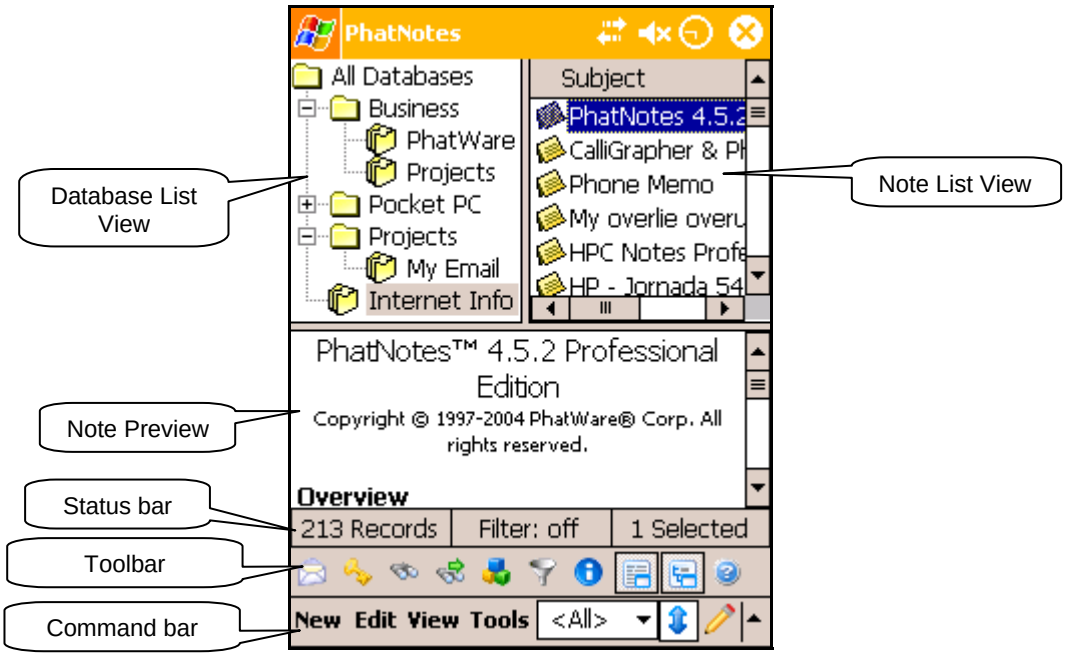

Figure 13. PhatNotes main screen.

Using the Command Bar

The PhatNotes command bar contains both menu and toolbar buttons (if selected). You also can drag the horizontal and vertical sliders to display as much of the Database List view, Note List view, and the Note Preview panes as you want. (See the *Working With the Notes Editor* Section.)

Working with Notes Databases

PhatNotes supports multiple databases. When you run PhatNotes for the first time it will create a default empty database called HPC Notes. The program keeps all databases in the Pocket PC objects store folder, usually named **Databases**.

Note: Due to Pocket PC performance limitations, notes database(s) cannot be moved to a different location.

Database Management

PhatNotes supports the following database management functionality:

Creating a new notes database. To create a new notes database, choose the **Tools/Database/Create** menu item. The **Create Database** dialog box will appear (see figure 14). Enter the desired database name and group, and then tap on OK. If a database with the same name already exists you will be asked to choose another name.

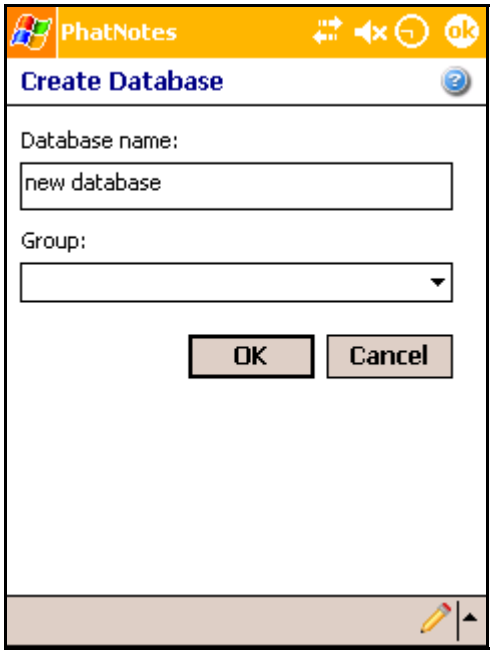

Figure 14. Create Database dialog box.

Opening an existing notes database. To open an existing database, choose the **Tools/Database/Open** menu item. The **Open Database** dialog box will appear (see figure 15). Select the desired database in the Available Databases list and tap OK.

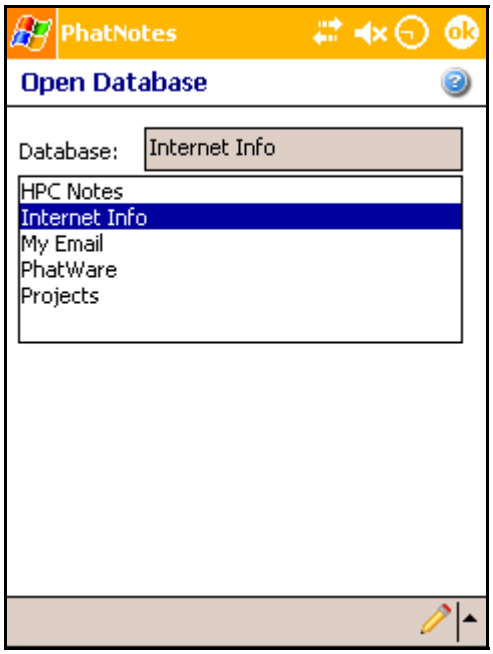

Figure 15. Open Database dialog box.

Deleting a notes database. *Important! If the mobile device is connected to the desktop PC, you must disconnect it before deleting the database.* To delete a notes database, choose the **Tools/Database/Delete** menu item. The **Delete Database** dialog will appear. Select the database you wish to delete and tap **OK**. PhatNotes will ask you to confirm this operation. We recommend that you make a complete backup of your Pocket PC, before deleting a database, because this operation cannot be undone. Please note that the active database cannot be deleted. To delete the active database you should open another database using the **Tools**/**Database/Open** command first.

Renaming a notes database. *Important! If the mobile device is connected to the desktop PC, you must disconnect it before renaming the database.* To rename a notes database, open the database you want to rename, then choose the **Tools/Database/Rename** menu item. The **Rename Database** dialog box will appear. Enter the new name for the database into the provided field and tap **OK**. During the next synchronization session ActiveSync will attempt to rename the corresponding database on the desktop PC. However, if the renamed database is in use it will fail to rename the database and an empty database with the old name will remain on the desktop PC after synchronization. You can delete the old database manually.

Emptying a notes database. To empty the active notes database, choose **Tools/Database/Empty** menu item. PhatNotes will ask you to confirm this operation. This operation is equal to deleting all notes from the Notes database. The Empty Database operation cannot be undone, therefore, we recommend making a complete backup of the Pocket PC before proceeding.

Copying notes between databases. To copy one or more selected notes to another database, choose the **Tools/Database/Copy Notes** menu item. The **Copy Notes to Database** dialog box will appear (see figure 16). If you want to move the selected notes instead of copying, check the **Move Notes** box. If you want to copy or move all notes from the current database to another one, check the **All Notes** box. Select the desired database from the **To** list and tap **OK**.

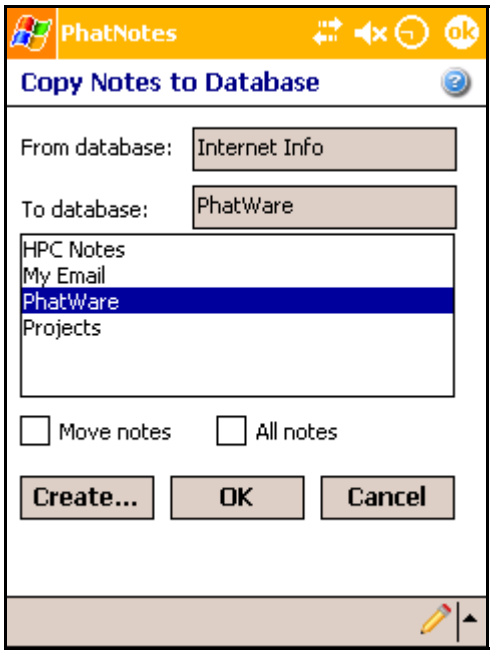

Figure 16. Copy Notes to Database dialog box.

Transferring notes between two Pocket PCs

You can transfer one or more selected notes between two Pocket PCs via infrared port.

Note: To transfer notes between two Pocket PCs via infrared port, both devices must be running the same version of PhatNotes. Check the version number in the About dialog box on both devices before transferring.

To transfer notes via infrared port:

1. On the host device (device that will be sending data), select one or more notes you wish to transfer.

   Note: To select more than one note on a Pocket PC, select a note, then click on the CONTROL or SHIFT key on the keyboard, then select the next note.

2. Choose the **Tools/Send via IR** menu item.
3. The **IR Transfer** dialog will appear and device will wait for a client device to be in infrared port range.
4. On the client device (device that will be receiving data), choose the **Tools/Receive via IR** menu item
5. The **IR Transfer** dialog box will appear and device will wait for a host device to be in infrared port range.
6. Line up infrared ports of client and host Pocket PCs.
7. As soon as both devices "see" each other, connection will be established and transfer will begin.

8. To terminate transfer before completion, tap the **Cancel** button on the host or client device.
9. Upon successful completion of the transfer, a notification message will appear on both devices. If there was an error, an error message will appear.

Note: Make sure that the infrared ports are always lined up during transfer.

Backing Up and Restoring the Notes Database

With PhatNotes you can backup one or more notes databases into a file, which you can store on the flash memory card, or copy to your desktop PC.

To backup one or more notes databases:

1. Choose the **Tools/Database/Backup** menu item.
2. The **Backup** dialog will appear (see figure 17).
3. To backup all notes databases, choose the **Backup All Notes Databases** option.
4. To backup the selected databases, choose the **Backup Selected Notes Databases** option and then select one or more databases you wish to backup from the list.
5. Tap **OK**.
6. A **Save As** dialog will appear, where you can save it with a new name, folder, database type, and location. You will see a progress dialog box while backup is in process. To stop the backup process before it finished, tap the **Cancel** button in the **Progress** dialog box.

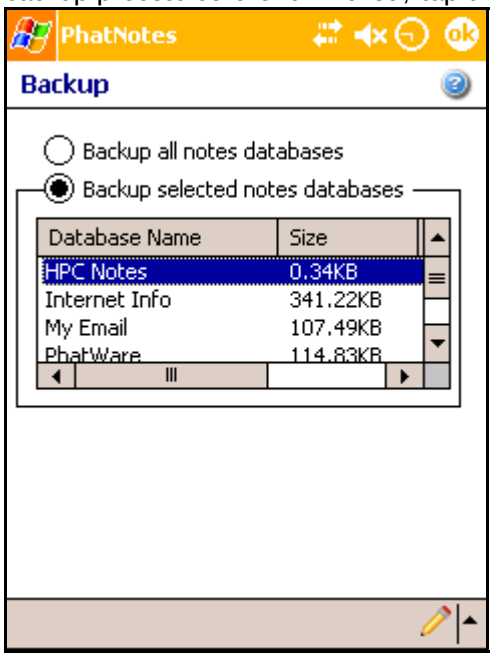

Figure 17. Backup Databases dialog box.

To restore one or more databases from the backup file:

1. Choose the **Tools/Database/Restore** menu item.
2. Browse for the backup file you want to restore databases from and select it.

3. If the selected file is a correct backup file, **Backup** dialog box will appear.
4. To restore all databases, choose the **Restore All Notes Databases** option.
5. To restore the selected databases, choose the **Restore Selected Notes Databases** option.
6. Tap **OK**.
7. You will see the progress dialog box while restore is in process. To stop the restore process before it is finished, tap the **Cancel** button in the progress dialog box.

Database Editing Commands

To create a new note, tap on **New** (Pocket PC) or select the **New Note** icon in the main toolbar, or choose the File/New Note menu item (desktop). This will display the notes editor. Each note can be provided with category and subject. To view these fields, make sure the **Subject & Category** item in the View menu is selected. Choose the predefined category from the list or enter a new category in the Category field, enter the subject into the Subject field and then enter the note text itself. Use the TAB key or Shift+TAB to jump between fields. Once you've finished editing the note, tap **OK**. See the *Working with the Note Editor* section below for more information about editing notes.

After creating the first note, it will appear in the note list. To edit the note, tap or double tap (depending on your **Options** settings) on the note entry in the list, or select the desired note in the list using the up or down arrow keys and press **Enter**.

To have a similar note with some minor modifications, select the note you want to create a copy of and choose the **Edit/Create Copy** menu item. It will create a copy of the selected note with the current creation and modification dates.

You can also select all the notes in the Notes List by choosing the **Edit/Select All** menu item.

It is also possible to transfer the note to other applications such as Pocket Word. To do so, select the note you want to copy to another application and choose the **Edit/Copy** menu item. Run Pocket Word (or another application) and choose the **Edit/Paste** menu item. The note text will appear in the Pocket Word editor.

To delete one or more unwanted notes from the database, select the note(s) you wish to delete and choose the **Edit/Delete** menu item. PhatNotes will ask you to confirm the deletion. *This operation cannot be undone!*

PhatNotes has a very important feature, which protects your notes from unauthorized access. When you protect a note with a password, PhatNotes will encrypt the note body using the password you've entered as an encryption key. The password itself will also be encrypted. All protected notes are encrypted; therefore, if you lose your device it is quite unlikely that anybody will be able to read your encrypted notes.

<u>To protect and encrypt notes:</u>

1. Select one or more notes from the Main Screen and tap on the Protect Button . The **Protect Note** dialog box will appear (see figure 18).

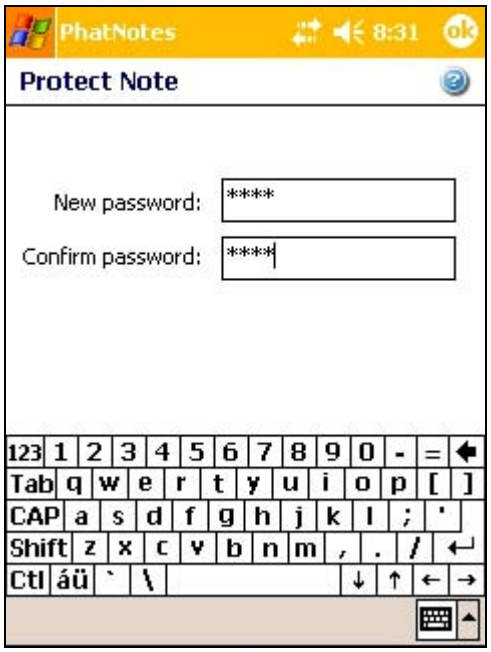

Figure 18. Protect Note dialog box.

2. Enter the desired password into the **New Password** and in the **Confirm Password** fields.
3. Tap **OK**.
4. In the Main Screen, the note will now appear with a key icon.

Note: You can also protect a note once opening it. See the *Protecting Notes with a Password* section, below.

Note: Remember your password. If you forget the password, you won't be able to read the password-protected note(s) again.

Sorting and Filtering Notes

PhatNotes allows you to sort notes by creation and modification date, category, and subject in ascending or descending order. You can also change sort order and field, using the **Options** dialog box (see "PhatNotes Settings" section). To sort data by any of these fields, simply click on the field header in the note list. An arrow will also appear in the header of the selected sort field. The arrow will point up if the sort is ascending, and point down if the sort is descending. To change a sort order, you can tap on the current sort header. The current sort field and sort order will automatically be saved when you quit PhatNotes. When you start the program again, it will use the same sort and filter options.

To filter notes by the date range, specific text, color, or priority:

1. Choose the **Filter** item from the **View** menu or tap on the **Filter** button . The **Filter** dialog box will appear (see figure 19).

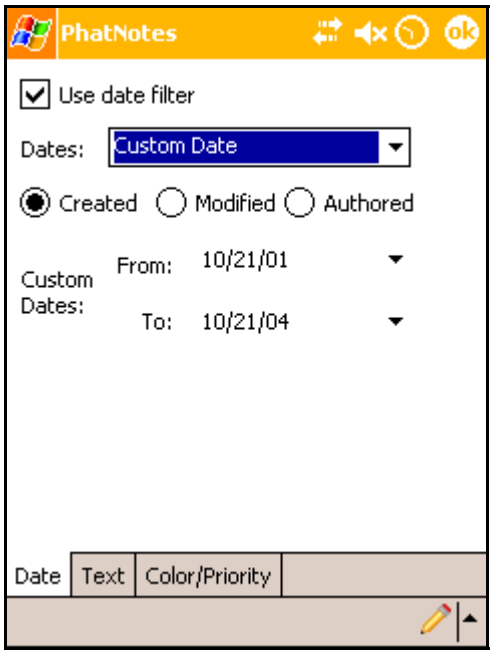

Figure 19. Filter dialog box: Date Filter tab view.

2. To apply the date filter, switch to the **Date** property sheet and check the Use Date Filter box.

3. Select the desired date range in the **Dates** list. You can also enter custom dates. To edit the custom dates range, select **Custom Date** in the **Dates** list and enter the starting and ending dates in the **From** and **To** boxes. The dates must be entered in the **mm/dd/yy** (or **mm/dd/yyyy** if the regional settings are set to a 4-digit year) format or click on the drop-down arrow and use the calendar to edit the date range. The starting date must be less or equal to the ending date.

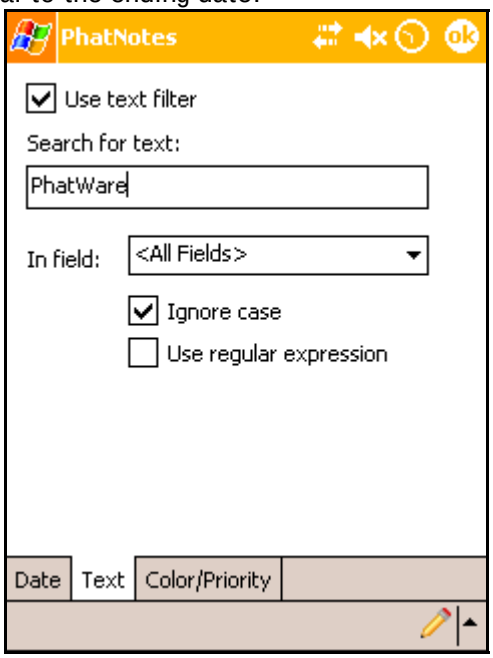

Figure 20. Filter dialog box: Text Filter tab view.

4. To apply the text filter, switch to the **Text** property sheet and check the **Use Text Filter** box (see figure 20).
5. Enter desired text into the **Search for the Text** box.
6. Select the field from the **In Field** list in which you wish to search for text.
7. For the case sensitive filter, uncheck the **Ignore Case** box.
8. If you want to use the regular expression search when filtering notes, check the **Regular Expression** box. For more information about the syntax of regular expressions, please see "*Appendix 3: Syntax of regular expressions*".
9. To apply the color filter switch to the **Color/Priority** property sheet and check the **Use Color Filter** box (see figure 21).

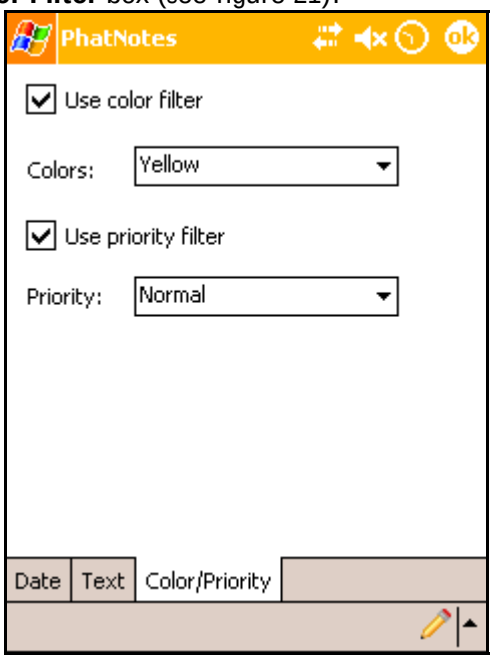

Figure 21. Filter dialog box: Color/Priority Filter tab view.

10. Choose the desired color from the **Colors** drop down menu.
11. To apply the priority filter switch to the **Color/Priority** property sheet and check the **Use Priority Filter** box (see figure 21).
12. Choose the desired priority (low, normal, or high) from the **Priority** drop down menu.
13. Tap **OK**.

The filter settings will be saved when you exit PhatNotes, and will be used again when you run the program.

Finding a Specific Note

You can find a note that contains the specific characters or words in the notes database using the Find command.

To find a note that contains a specific text in the current database:

1. Choose the **Find** item in the **Edit** menu, tap on the **Find** button , or press the **Ctrl+F** keys. The **Find Note** dialog box will appear (see figure 22).

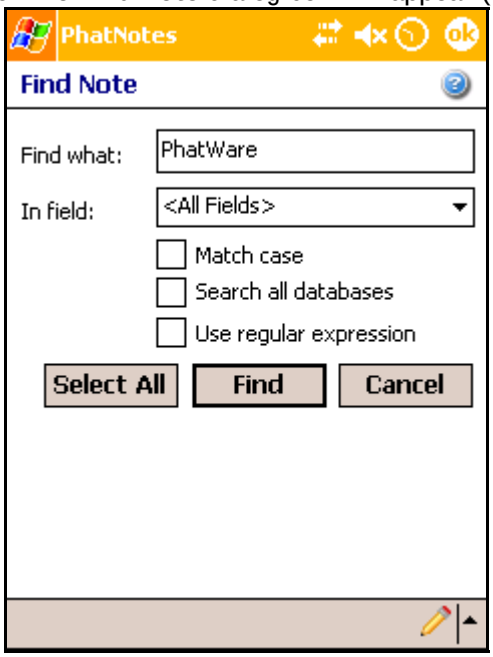

Figure 22. Find Note dialog box.

2. Enter the specific characters or word you wish to find in the **Find What** box.
3. Choose the field in which you want to find these characters or words in the **In Field** list. Choose <All Fields> to search in all database fields excluding password, creation and modification dates.
4. For a case sensitive search, check the **Match Case** box.
5. If you want to use the regular expression search, check the **Regular Expression** box. For more information about the syntax of regular expressions, please see "*Appendix 3: Syntax of regular expressions*".
6. Tap **Find** to find a note with the requested characters or word.
7. Tap **Select All** to select all notes that contain this text.

PhatNotes will search for the note that contains the specified characters or words starting from the selected note. If a note is found, it will be selected. To find the next note, choose the **Edit/Find Next** menu item or press **Ctrl+J** keys. If PhatNotes is unable to find a note, a warning message will be displayed.

To find all notes which contain a specific text in all databases:

1. Choose the **Find** item in the **Edit** menu or press **Ctrl+F** keys. The **Find Note** dialog box will appear (see figure 22).
2. Enter the specific characters or word you wish to find in the **Find What** box.
3. Choose the field in which you want to find these characters or words in the **In Field** list. Choose <All Fields> to search in all database fields excluding password, creation and modification dates.
4. Check the **Search All Databases** box.

5. For a case sensitive search, check the **Match Case** box.
6. Tap **Find**.
7. The **Search Results** dialog box will appear with a list of all found notes (see figure 23).
8. To go to the specific note, double tap the desired note in this list. If the selected note is in another database, the PhatNotes will open the required database.

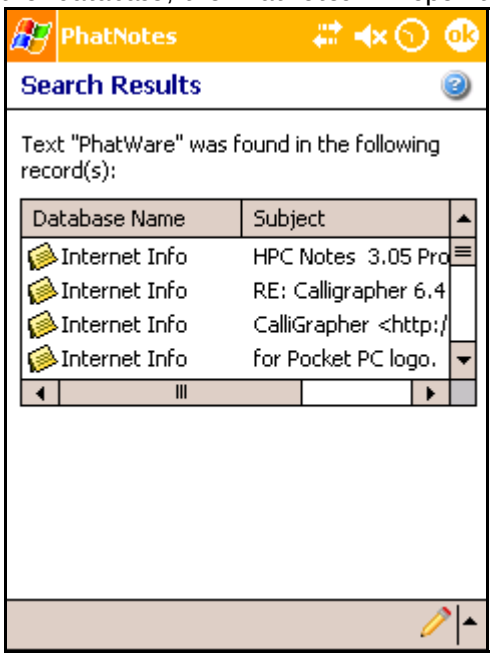

Figure 23. Search Results dialog box.

Organizing Notes

PhatNotes allows a user to organize notes by the following categories:

Creation date

Modification date

Category

Color

Priority

To organize notes by the creation date, choose **View/Organize Notes/By Creation Date** menu item.

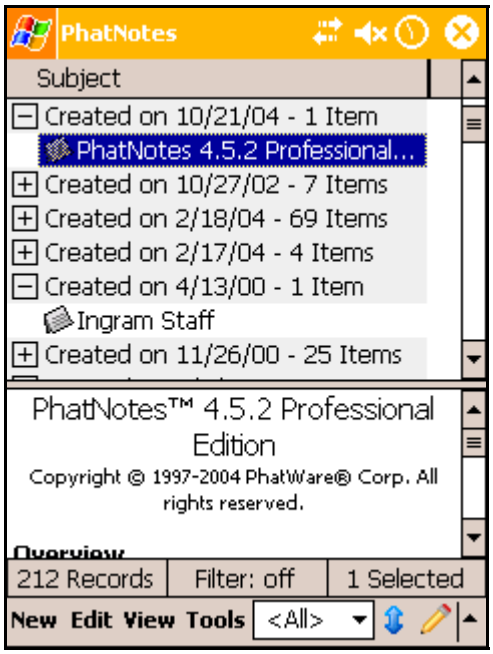

Figure 24. Organizes notes list.

Notes list view will change, so notes will be grouped by the creation date (see figure 24). You can expand/collapse each group by taping on the **[+]** button, or by double-tapping on the group header, or by pressing Enter key when the desired group title is selected. Each group title displays the category name and amount of notes in the group. Notes list view has a similar look when organized by modification date, category, or color.

- To organize notes by the modification date, choose **View/Organize Notes/By Modification Date** menu item.
- To organize notes by the category, choose **View/Organize Notes/By Category** menu item.
- To organize notes by the color, choose **View/Organize Notes/By Color** menu item.
- To organize notes by the priority, choose **View/Organize Notes/By Priority** menu item.
- To collapse all the notes groups, choose **View/Organize Notes/Collapse All** menu item.
- To expand all the notes groups, choose **View/Organize Notes/Expand All** menu item.
- To return to the regular notes view, choose **View/Organize Notes/Disable** menu item.

While notes are organized by one of the categories listed above, you can still sort notes by any field and apply text, date, color, and/or priority filters.

You can also change the authoring date by choosing **View/Authoring Date**. The **Edit Authoring Date** dialog box appears. Select your new authoring date from the drop down menu and time (if desired).

Note Properties

You can also change the properties of the selected note. Go to the **Edit** menu and tap on **Properties (s**ee figure 25).

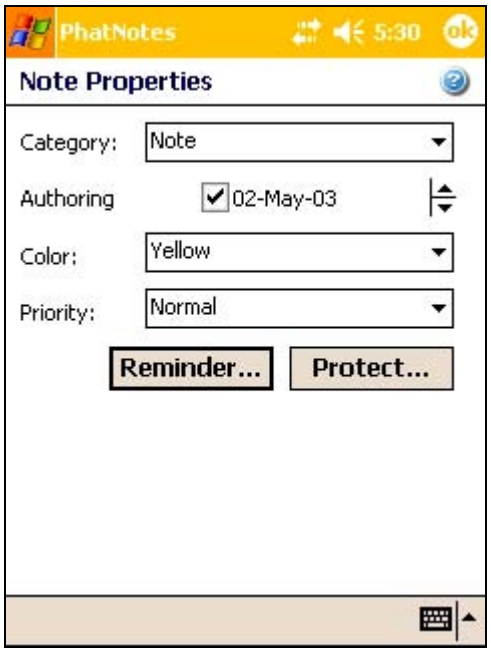

Figure 25. Note Properties dialog box.

- Select the category to change from the **Category** drop down menu.
- Then select the properties you want to change, which includes the authoring date, color, priority, reminder time, and password.
- If multiple notes are selected, the Reminder button will not appear in this dialog box because it is not possible to assign the same reminder to multiple notes.
- If a single protected note is selected the **Protect** button is disabled. To change the password or unprotected the note you must open the note in the note editor first. If multiple notes are selected, the password will be changed (set) to the unprotected notes; password for notes that are already protected will not be changed. This has been done for the security reasons.

Working with the Note Editor

The note editor is used to create a new note or edit an existing note. To create a new note, tap on **New** or tap on the **New Note** icon in the main toolbar, choose File/New Note menu item. To edit an existing note, double tap on the desired note in the note list or select the desired note and press **Enter**. The note editor dialog box will be displayed (see figure 26).

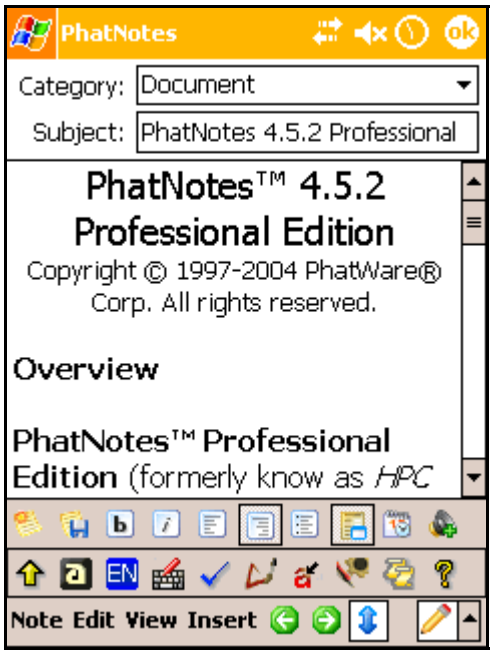

Figure 26. Note editor dialog box.

When creating a new note, enter the note's category (or select category from the list) into the **Category** field, enter note's subject into the **Subject** field and enter text into the note **Body** field. The category and subject fields are optional; however, you must enter the text into the body or subject field, otherwise a new note cannot be created.

If you are not using subject and category fields, you can hide these fields using the **View/Subject & Category** command or tap the **Show Subject & Category** button. This will increase the size of the note field so you can see more text on the screen. To show the subject and category fields, use the same command again.

The note editor provides standard editor functionality such as Delete, Cut, Copy, and Paste text. These commands are applied to the note field only.

- To cut text so you can move it to another location, select the text, then on the **Edit** menu, click **Cut** or tap the Cut Button in the toolbar (if selected from the toolbar editor).
- To copy text so you can paste a copy in another location, select the text, then on the **Edit** menu, click **Copy** or tap the Copy Button in the toolbar (if selected from the toolbar editor).
- To paste text you have cut or copied, place the insertion point where you want to paste the text, then on the **Edit** menu, click **Paste** or tap the Paste Button in the toolbar (if selected from the toolbar editor).
- To change a note color, select the desired color from the **Edit/Color** menu. The color of the note's icon will be changed accordingly.
- To change a note priority, select the desired priority from the **Edit/Priority** menu. A priority can be **low**, **normal**, or **high**.

You can also undo the last editing operation by choosing the **Undo** item from the **Edit** menu or by tapping on the **Undo** button in the toolbar (if selected from the toolbar editor).

Finding and replacing text

With the note editor you can search for specific text. To find specific characters or words:

1. Choose the **Find** item from the **Edit** menu. The **Find Text** dialog box will appear (see figure 27).

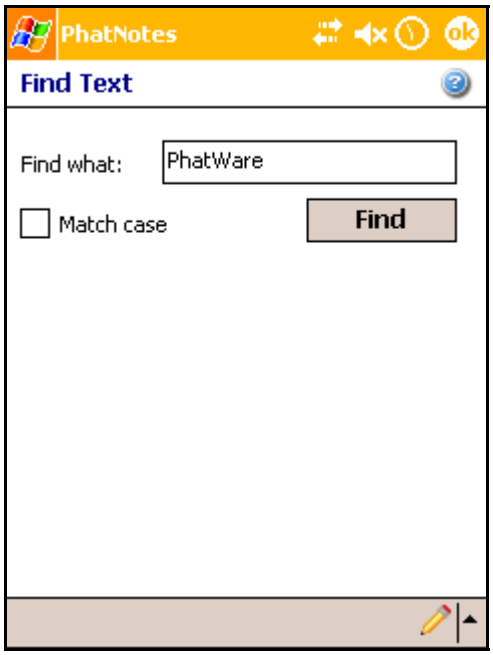

Figure 27. Find Text dialog box.

2. In the **Find What** box, type the characters or words you want to find. Check the **Match Case** box for a case sensitive search.
3. Tap **Find**.

To replace specific characters or words with other characters or words:

1. Choose the **Replace** item from the **Edit** menu. The **Replace** dialog box will appear (see figure 28)

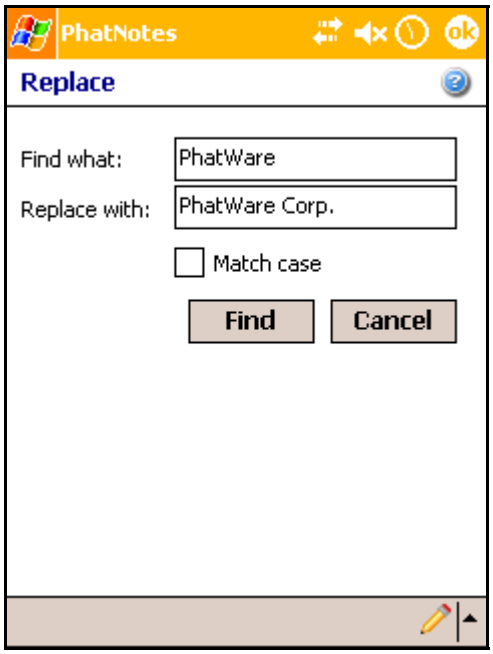

Figure 28. Replace dialog box.

2. In the **Find What** box, type the characters or words you want to find. Check the **Match Case** box for a case sensitive search.
3. In the **Replace With** box, type the characters or word you want to replace the found text with or leave it blank to delete found characters or words.
4. Tap **Find**.
5. When the specific text you're searching for is found it will be selected and the **Find/Replace** bar will appear (see figure 29).

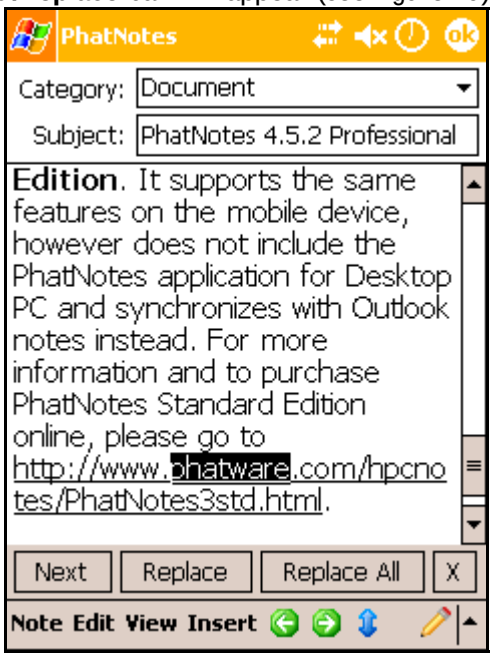
PhatNotes
Category: Document
Subject: PhatNotes 4.5.2 Professional
Edition. It supports the same features on the mobile device, however does not include the PhatNotes application for Desktop PC and synchronizes with Outlook notes instead. For more information and to purchase PhatNotes Standard Edition online, please go to http://www.phatware.com/hpcnotes/PhatNotes3std.html.
Next
Replace
Replace All
X
Note Edit View Insert

Figure 29. Find/Replace bar.

6. Tap **Replace** to replace the text found, tap **Find Next** to find the next occurrence of this text, tap **Replace All** to replace all occurrences of this text, otherwise tap the **[x]** button in the title bar to close the dialog box.

Importing and exporting text files

The import and export functions can be used to transfer a note's text between PhatNotes and other applications. You can import (export) files in Plain Text, Rich Text, and Pocket Word formats.

To import a text file into the note box:

1. Choose **Import** item from the **Note** menu. The standard **Open** dialog box will appear.
2. Select the desired file name in the browse window, enter the file name into the name box.

WARNING All previously entered text in the selected note will be replaced by the imported file's text.

To export the note as a text file:

3. Choose **Export** item from the **Note** menu. The **Save As** dialog box will appear.
4. Enter the desired file name into the name box.
5. Select the folder, type, and location in which to save the exported note.
6. Tap **OK**.

Protecting Notes with a Password

With PhatNotes you can protect notes from unwanted access with a password. The protected note(s) are encrypted using the password as a protection key. The password itself is encrypted as well.

To protect note with a password:

1. Choose the **Note/Protect** menu item. The **Protect Note** dialog box will appear.
2. Enter the desired password into the **New Password** box.
3. Enter the same password into the **Confirm Password** box for confirmation.
4. Tap **OK**.

To remove password protection:

- Tap the **Note/Unprotect** menu item.

To change a password:

- First remove password protection, then enter another password as above.

Important! Remember your password. If you forget the password you won't be able to read the password-protected note(s) again.

Sending email messages from PhatNotes

The notes editor allows you to send email messages directly from PhatNotes. You can email a single note from the Note Editor. You also can send up to 64 notes as attachments in a single email, using the **Tools/Send Mail** command from the main menu, or Note/Send Mail from the edit menu.

To send the note as an email message:

1. Choose the **Send Mail** item from the **Tools** or **Note** menu. The **Send Email** dialog will appear (see figure 30).

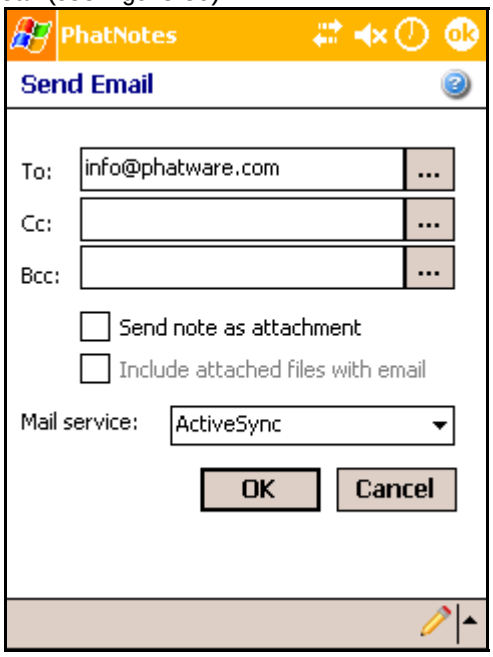

Figure 30. Send Email dialog box.

2. If sending a single note, you can choose to email this note as an attachment by checking the **Send Note(s) as Attachment** box. If multiple notes are selected from the Main Menu, this box will be unavailable and will be automatically sent as an attachment. You can also choose to include any files that are attached to a note as part of the email. However, you **cannot** send notes as an attachment **and** include attached files with the email at the same time.

3. Enter the desired email address into the **To** box. PhatNotes provides a quick access to email addresses stored in the contacts database. Tap the button to view the list of names and email addresses stored in the contacts database. The **Email Address** dialog box will appear (see figure 31).

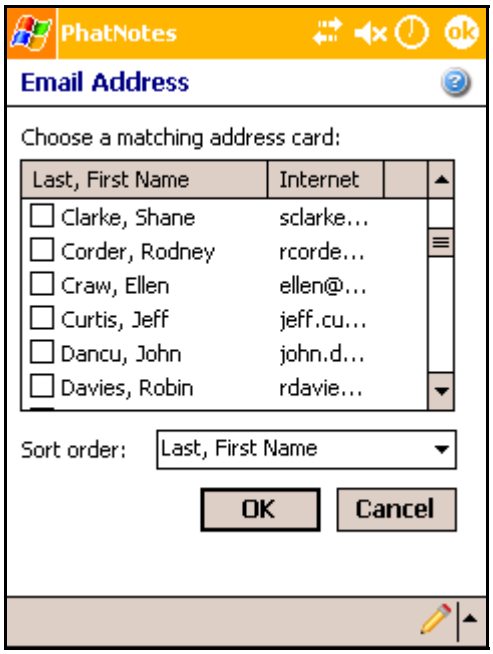

Figure 31. Email Address dialog box.

4. Select the desired email address from the list and tap **OK**. The email address will appear in the **To** box
5. If you want to CC and BCC the same message, enter email addresses into **Cc** and **Bcc** boxes.
6. Select the service you wish to use to send the mail message from the **Mail Service** drop-down menu.
7. Tap **OK**.
8. If you are emailing one or more notes as an attachment **Email Note as Attachment** dialog box will appear.
9. Enter email subject into the **Subject** box.
10. Enter optional body text into the **Body** box.
11. Choose **Plain Text** or **Rich Text** option to specify the attachment format.
12. Tap **OK**.

> **Note:** The Rich Text option will have no effect if notes are stored in the database as plain text. See "PhatNotes Settings" section for more information.

The email message will be placed in the Outbox of your email client. It will be sent the next time you connect to the mail server or synchronize with the desktop PC depending on which mail service has been used. For more information about mail services, see "Staying in touch with Inbox" section in the Pocket PC user manual.

Inserting Contact Information

To insert contact information into a note's body:

1. Choose the **Contact** item from the **Insert** Menu. The **Insert Contact** dialog box will appear (see figure 32), unless your contacts database is empty.

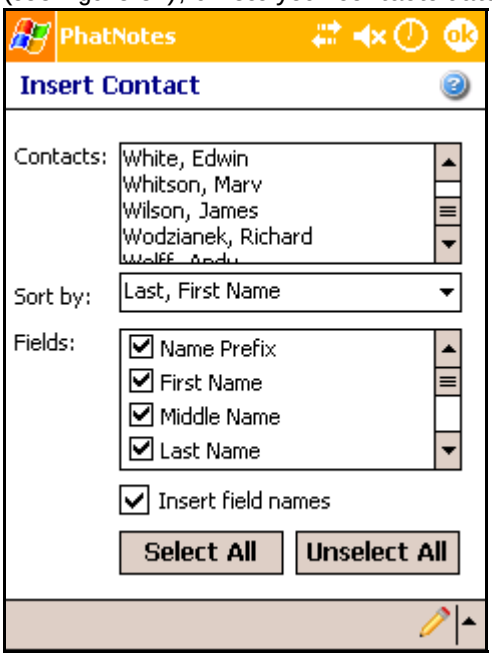

Figure 32. Insert Contact dialog box.

2. Select one or more contacts from the **Contacts** list.
3. Check field(s) that you want to insert in the **Fields To Insert** check list,
4. You can sort contacts in the Contacts list by *Last, First Name* or by *Company Name*. To change sort order, select the desired sort order in the **Sort By** box. The **Contacts** list will be updated automatically.
5. You can insert contact information with or without field names. To insert contact information with field names, check **Insert Field Names** check box.
6. Tap **OK** when ready.

Contact information will be inserted at the current cursor location.

Inserting Current Date and Time

To insert the current date and time into the body text, choose the **Date & Time** item from the **Insert** menu. From here you can choose from the following formats:

Format Option	Results Example
Short Date & Time	8:56 PM 5/2/06
Long Date & Time	8:56 PM Tuesday, May 02, 2003
Short Date Only	5/2/03
Long Date Only	Tuesday, May 02, 2003
Time Only (AM/PM)	8:56 PM
Time Only (24h)	20:56

NOTE: Your results may vary slightly from the above examples, depending on your regional settings. To change the date and time format, use the **Regional Settings Properties** dialog box in the **Pocket PC Control Panel**.

The current date and time will be inserted at the current cursor location.

Inserting Reminders

To insert a user reminder:

1. Choose the **Reminder** item from the **Insert** menu. The **Create Reminder** dialog box will appear (see figure 33).

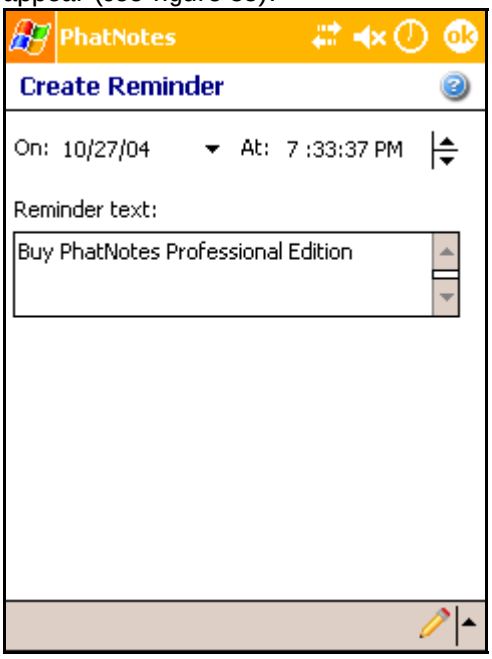

Figure 33. Create Reminder dialog box.

2. Enter the desired date and time into the **On** and **At** fields. The default reminder time and date can be changed using the Options dialog box. See the "Default Settings" section for more information.
3. Enter optional reminder text into the **Text** field. The note's subject initially appears in this field automatically.
4. Tap **OK**.

A note that contains a reminder will be marked with a *bell* icon in the Main Screen until the notification goes off.

To remove the reminder, tap the **Remove** button in the **Reminder** dialog box.

Note: Only one reminder can be associated per note.

Creating a New Appointment and Task

You can create a new appointment or task directly from the note editor.

To create a new appointment, choose the **Insert/Appointment** menu item. The standard Pocket Outlook's **Appointment** dialog box will appear. By default, the note's subject will be copied to the title field of the new appointment, the note's category to category field and the note's body to the note field. To change the defaults, use the **Task/Appointment** property sheet of the **Options** dialog box (see the *Note Editor Options* section below).

To create a new task, choose the **Insert/Task** menu item. The standard Pocket Outlook's **Task** dialog box will appear. By default, the note's subject will be copied to the title field of the new task, the note's category to category field and the note's body to the note field. Task will have the same priority as the current note. To change the defaults, use the **Task/Appointment** property sheet of the **Options** dialog box (see the *Note Editor Options* section below).

View Options

From the View menu, you can jump to the previous or next note, show and edit the authoring date, read statistics about the note, change the zoom, view or hide the Subject and Category header, view or hide the links, and go to the Toolbar Editor.

Deleting notes

From the currently opened note, you can delete it by choosing **Delete** from the **Note** menu. You can also delete notes from the Main Screen by choosing **Delete** from the **Edit** menu. In both cases, you will receive a Warning message before the note is permanently deleted.

Attachments and Notes Linking

PhatNotes allows a user to attach a shortcut to any file and to other notes.

Inserting attachments

To insert a link to a file:

1. Open the note you want to attach a file to.
2. Choose the **File** item from the **Insert** menu. The standard **Open** dialog box will appear (see figure 34).

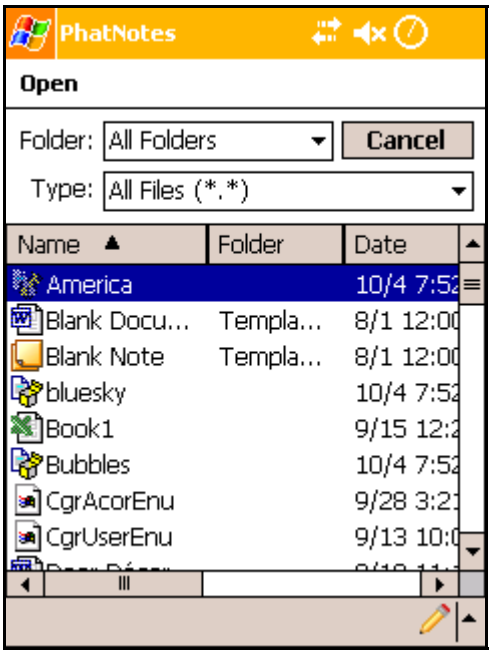

Figure 34. Open dialog box.

3. Tap on the file you want the note to link to.
4. In the Note Preview pane of the Main Screen, a file link icon will appear.
5. Tap on the file link icon. The list of linked files will appear.
6. Tap on the file you want to open.
7. Alternately, if **View Attachments & Links** is enabled in the Note Editor, tap on the file name in the Attachments and Links list (see figure 35).

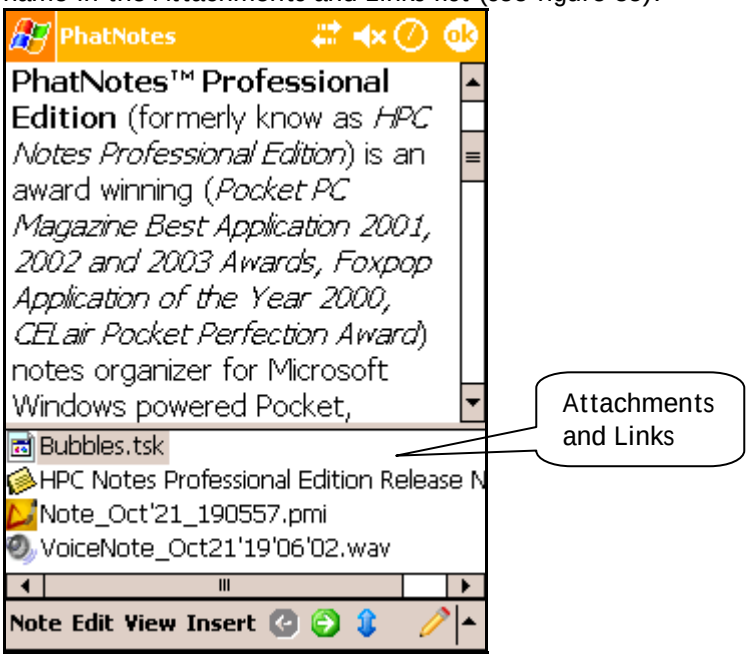
PhatNotes
PhatNotes™ Professional Edition (formerly know as HPC Notes Professional Edition) is an award winning (Pocket PC Magazine Best Application 2001, 2002 and 2003 Awards, Foxpop Application of the Year 2000, CELair Pocket Perfection Award) notes organizer for Microsoft Windows powered Pocket,
Attachments and Links
Bubbles.tsk
HPC Notes Professional Edition Release N
Note_Oct'21_190557.pmi
VoiceNote_Oct21'19'06'02.wav
Note Edit View Insert

Figure 35. Attachments and Links list.

Linking to other notes

To insert a link to another note:

1. Open the note you want to create a link for.
2. Choose the **Link** item from the **Insert** menu. A dialog box with the list of notes will appear (see figure 36).

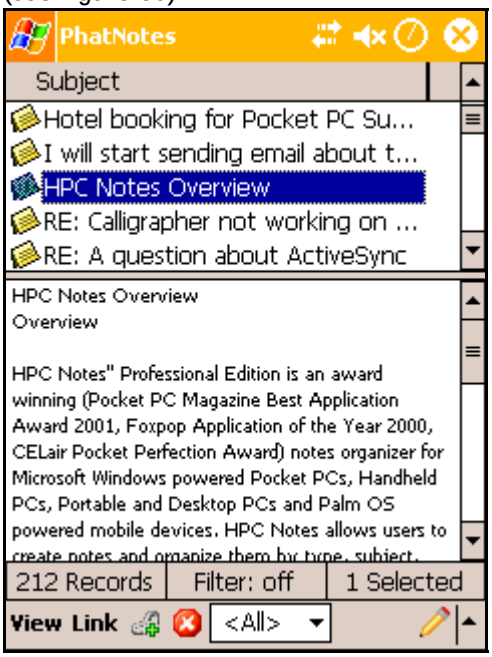
PhatNotes
Subject
Hotel booking for Pocket PC Su...
I will start sending email about t...
HPC Notes Overview
RE: Calligrapher not working on ...
RE: A question about ActiveSync
HPC Notes Overview
Overview
HPC Notes" Professional Edition is an award winning (Pocket PC Magazine Best Application Award 2001, Foxpop Application of the Year 2000, CELair Pocket Perfection Award) notes organizer for Microsoft Windows powered Pocket PCs, Handheld PCs, Portable and Desktop PCs and Palm OS powered mobile devices. HPC Notes allows users to
212 Records
Filter: off
1 Selected
View Link
<All>

Figure 36. Link Note dialog box.

3. Tap on the note or notes you want the note to link to.
4. Click on the Link Selected Notes icon or select **Create Link** from the **Link** menu.
5. To return to the note without linking, tap on the **Return to Note Editor** button .
6. In the Note Preview pane of the Main Screen, a note link icon will appear .
7. Tap on the note link icon. The list of linked notes will appear.
8. Tap on the note you want to open.
9. Alternately, if **View Attachments & Links** is enabled in the note editor, tap on the note in the Attachments and Links list (see figure 35).

Creating and inserting a voice note

To create and insert an audio file to a note:

1. Open the note you want to create an audio file link for.
2. Choose the **Voice** item from the **Insert** menu. A voice recording toolbar will appear (see figure 37).

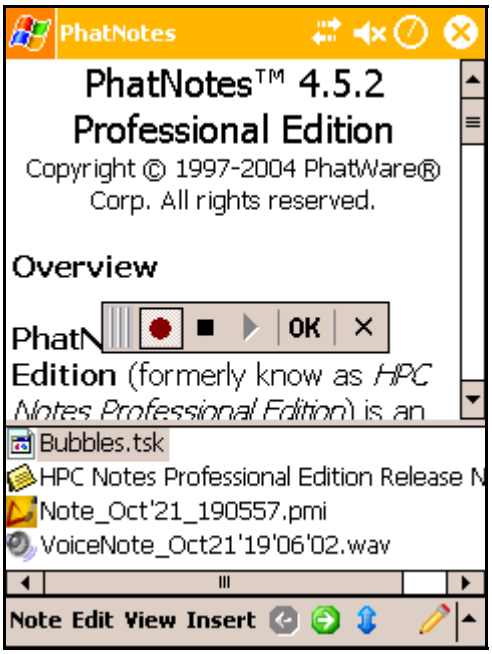

Figure 37. Voice recording toolbar.

3. When you are ready, tap the record button, then speak into the device's mike.
4. When done, tap the stop button.
5. To review the voice note, tap the play button.
6. When satisfied with the recording, tap the OK button. The attached audio file will appear in the lower pane.
7. To play the recording again, tap the audio file. A voice playback toolbar will appear (see figure 38).

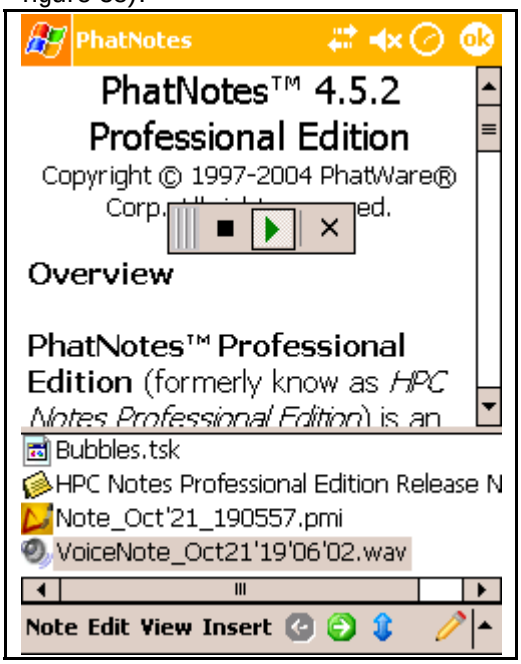

Figure 38. Voice playback toolbar.

Integration with PhatPad

To insert a link to an ink file:

1. Open the note you want to create a link for.
2. Choose the **Ink** item from the **Insert** menu. A blank **PhatPad** will appear.
3. Draw the picture or write some text, then save.
4. Close the scratch pad.
5. In the Note Preview pane of the Main Screen, a file link icon will appear .
6. Tap on the file link icon. The list of linked files, including the scratch pad files will appear.
7. Tap on the ink file you want to open.
8. Alternately, if **View Attachments & Links** is enabled in the note editor, tap on the ink note file name in the Attachments and Links list (see figure 35).

To recognize an ink note

1. Create a new ink note or open an existing note
2. Write some text you want to recognize.
3. Select the Tool/Recognize menu command, the Recognition Options dialog box will appear.

Figure 39: PhatPad

4. The recognized text will be inserted in note's body at the current cursor location (see figure 40).

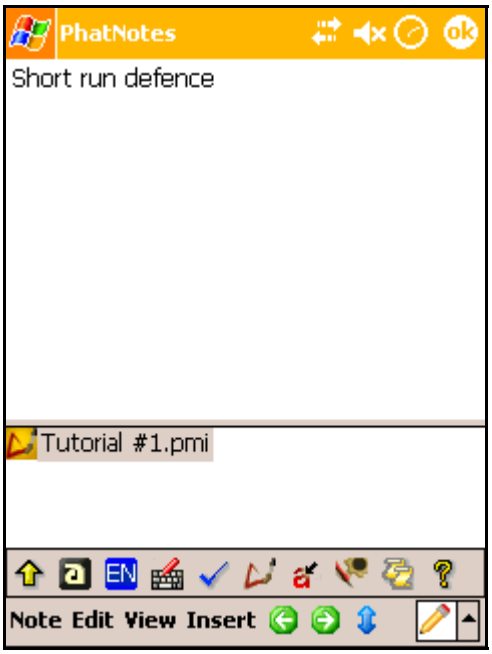

Figure 40: Recognized text pasted in PhatNotes

Note: CalliGrapher's 6.x scratchpad mode is also supported.

Links and Attachments Popup Menu

To open, delete, and attach more files and notes, rest the stylus inside the **Attachments and Links list** pane. The *Links and Attachment* popup menu will appear (see figure 41).

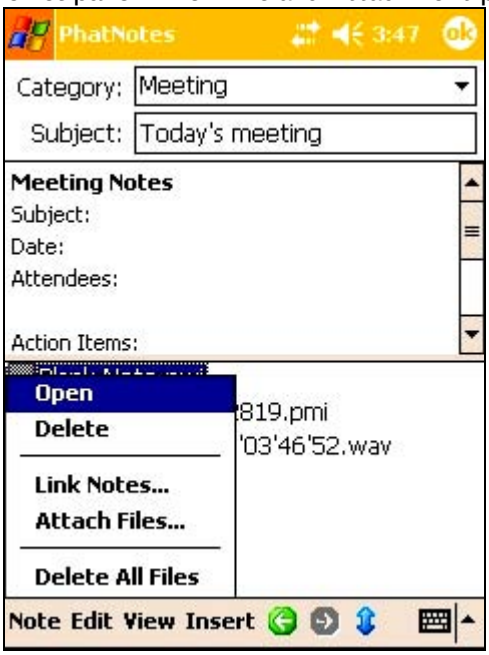

Figure 41: Links and Attachment popup menu.

1. To open a selected file or note, tap on the **Open** menu item.
2. To delete a selected file or note, tap on the **Delete** menu item.

3. To attach another file, tap on the **Attach File** menu item.
4. To link to another note, tap on the **Link Note** menu item.
5. To delete all links to this note, tap on the **Delete All Links** menu item. This will **not** delete the linked notes, just the link itself.
6. To delete all files attached to this note, tap on the **Delete All Files** menu item. This will include any attached ink files. You will be given an option to delete **both** the link **and** the actual selected files or just delete the link itself.

Formatting Text

PhatNotes allows a user to apply Font, Paragraph, and Tabs formatting to the note's body.

Changing Fonts

To change a font type, style, or size:

1. Select the text whose format you want to change.
2. Choose the **Format** item from the **Edit** menu then tap **Font**, or click on the **Format Dialog** button on the **Format Bar**. To show the Format Bar, click on the **Show Format Bar** button . The **Font** dialog box will appear (see figure 42).

Figure 42. Font dialog box.

3. Select the font you like from the **Face** list.
4. Select the font size you like from the **Size** list.
5. Choose the desired color from the **Color** drop-down color palette.
6. Choose the font style by checking the **Bold**, **Italic**, **Underline** and/or **Strikethrough** boxes.

7. Tap **OK**

You can specify the font for new text by changing the font settings before you begin to type.

You can change the font for an entire document by clicking the **Edit** menu and then clicking **Select All** before changing the formatting.

Formatting a Paragraph

To format a paragraph:

1. Click anywhere in the paragraph you want to format.

2. Choose the **Format** item from the **Edit** menu then tap **Paragraph.** The **Paragraph** dialog box will appear (see figure 43).

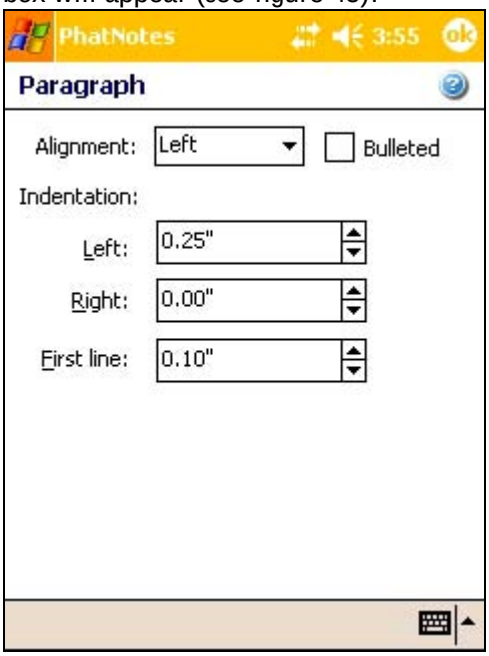

Figure 43. Paragraph dialog box.

3. Enter the alignment option you want from the drop-down menu.
4. To bullet a paragraph, check the **Bulleted** check box.
5. You can add left, right, and first line indents to each paragraph by tapping on the arrows to the right of each value. Only the selected paragraphs or the paragraph containing the cursor will be affected.
6. Tap **OK**.

You can define paragraph formatting for a new document by changing the format options before you begin to type.

You can change the alignment and bullet options by using the **Format Bar** (see figure 44).

Figure 44. Format bar.

To show the Format Bar, click on the **Show Format Bar** button .

Importing and Exporting Notes

PhatNotes allows importing and exporting the entire notes database or selected notes from the notes list as a text file. Tab Separated Values (TSV) and Comma Separated Values (CSV) formats are currently supported. Using the **Export** and **Import** menu commands from the Main Menu, it is possible to transfer data between PhatNotes and other applications.

To import notes from a file:

1. Choose **Import** item from the **Tools** menu. **Import** dialog box will appear (see figure 45).

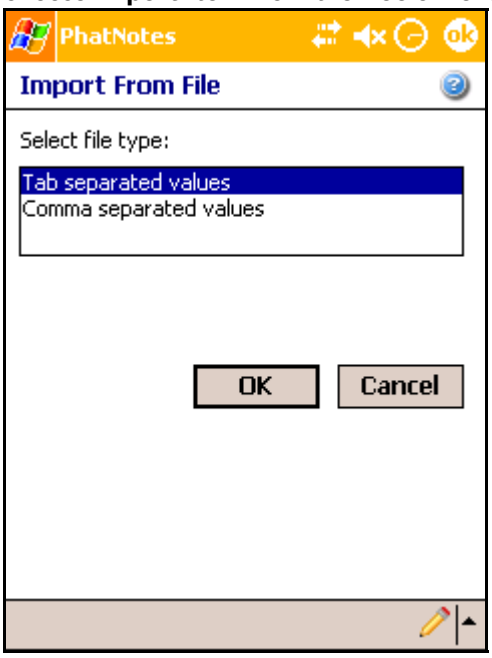

Figure 45. Import dialog box.

2. Select desired file type and tap **OK**.
3. The **Open** dialog box will appear. Tap on the desired file name.
4. In the **Map Custom Fields** dialog box (see figure 46) map the file and PhatNotes field. You can map up to the following PhatNotes fields: Subject, Category, Note, Created, Modified, Authored, and Color.

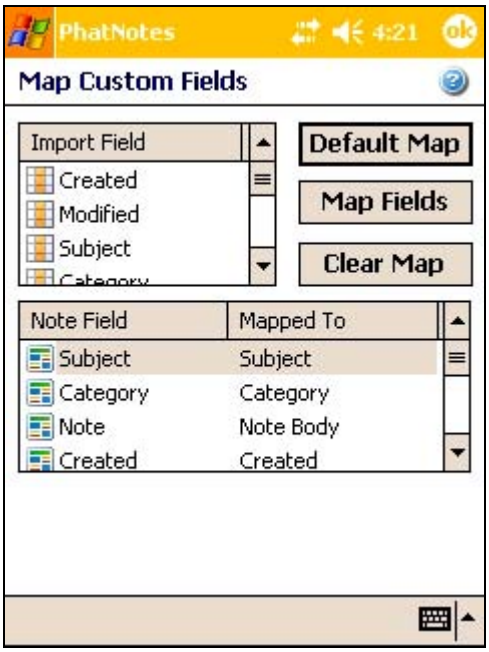

Figure 46. Map Custom Fields dialog box.

To map fields:

- Select a field name in the **File Fields** list and a field name in the **PhatNotes Fields** list and tap **Map Field**. The File Field selected will now show under the **Mapped To** heading.
- Tap **Clear Map** to clear the current map list.
- Tap **Default Map** to create a default map list, if possible.
- Tap **OK**.
- The **Import Options** dialog box will appear.

Note: You must map the Note Body field to proceed with importing a file.

5. In the **Import Options** dialog box (see figure 47) you can change the following import options:
   - Select **Allow Duplicate Items to be Created** box to create duplicate items
   - Select **Replace Duplicate Items with Imported** box to replace duplicate items.
   - Select **Do Not Import Duplicate Items** box to leave the duplicate items in the notes database untouched.
   - Choose the default color for a new note from the **New Note Color** drop-down menu.
   - Choose the date format you want from the **Date Format** drop-down menu.
   - Check **Skip First (Header) Record** to skip the very first record in the imported file. This record usually contains field names.
   - Tap OK.

Note: When checking for duplicate items, PhatNotes uses the Note Body field only.

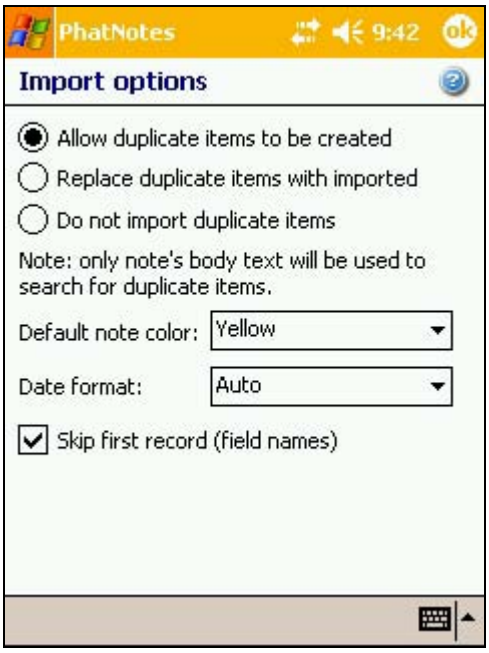

Figure 47. Import Options dialog box.

To export notes into a text file:

1. Choose the **Export** item from the **Tools** menu. The **Export Notes** dialog box will appear (see figure 48).

Figure 48. Export Notes dialog box.

2. Select the desired file format in the **Select File Type** list box.
3. Check the **Export field names as first record** box to put the field names in the first record.
4. Check the **Export Selected Notes Only** box to export selected notes only.

5. Tap **OK**.
6. In the **Save As** dialog box, enter the desired file name into the Name box, select the folder, file type, and location, and tap **OK**.

Note: Password-protected notes will not be exported for security reasons. If this is attempted, a warning message will be displayed.

PhatNotes Settings

You can customize the PhatNotes view and the default settings by changing various parameters in the **Options** dialog box. To display the **Options** dialog box, choose the **Tools/Options** command in the main menu. The **Options** dialog box contains the following property sheets: **General**, **View**, **Toolbar**, **New Note**, **Columns**, **Notes List**, **New Note**, **Reminder**, **Voice Notes**, and **Note Editor**.

General Options

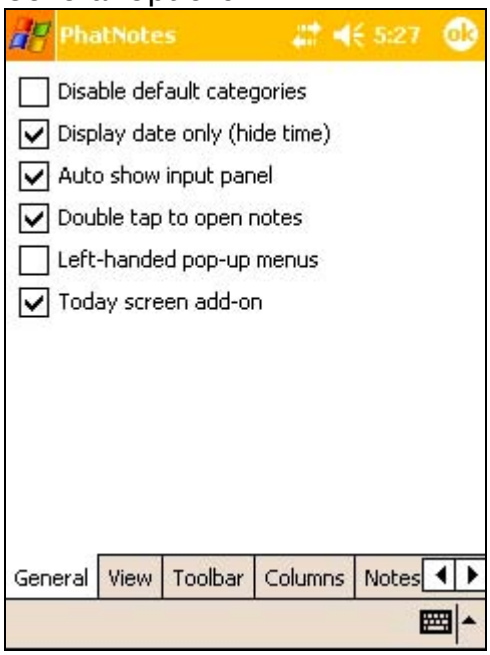

Figure 49. Options dialog box: General property sheet.

1. Switch to the **General** property sheet (see figure 49).
2. Check the **Disable default categories** box to remove the default document types in the note editor's drop-down category list. If default types are hidden, only categories that are used in the notes database will appear in the list.
3. Check the **Display date only** box to show the date only (no time) in the **Created** and **Modified** columns in the note list.
4. Check the **Auto show input panel** to automatically show the input panel when the Note Editor window appears.

5. Check **Double tap to open note** if you want to double-tap to open a note instead of a single tap.
6. Check **Left-handed pop-Up menus** to allow the popup menus to appear on the right side of the stylus.
7. Check **Today screen add-on** to add PhatNotes to the **Today** screen. See the *Today screen option section*, below.

View Options

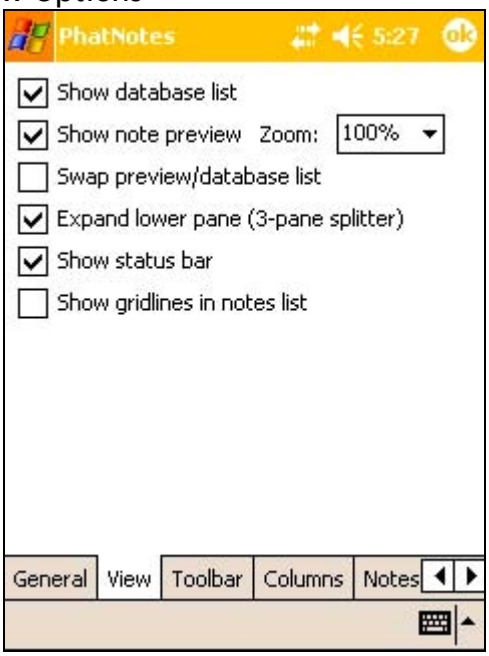

Figure 50. Options dialog box: View property sheet.

1. Switch to the **View** property sheet (see figure 50).
2. Check **Show database list** to show the Database directory in a separate pane on the left side of the Main Screen.
3. Check **Show note preview** to show the top portion of a selected note in the Main Screen. You can also zoom the Note Preview from 25% to 300%.
4. Check **Swap preview/database list** to show the preview pane (if selected) on the left side of the Main Screen. If **Show database list** is also selected, both the Notes List and Database List panes will be on the right side of the Main Screen.
5. Check **Expand lower pane** to extend the lower pane across the entire bottom of the screen.
6. Check **Show status bar** to show the Status Bar at the bottom of the Main Screen (number of notes in the Notes List, Filter on or off, and number of notes currently selected).
7. Check **Show gridlines in notes list** to show lines that separate the notes and columns.

Customizing the Toolbar

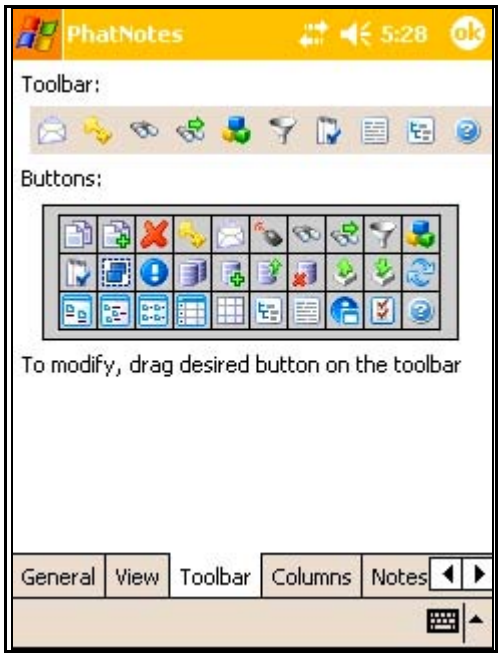

Figure 51. Toolbar dialog box: New Note property sheet.

1. Switch to the **Toolbar** property sheet (see figure 51).
2. The existing toolbar buttons are shown at the top of the window. To see a brief description of a button's function, tap on a button.
3. To change an existing toolbar button, drag the desired button from the **Buttons** list onto the **Toolbar**.
4. To change the position of a toolbar button, drag a button that is already present in the toolbar and drop it in the desired position.

Choosing Columns to Display

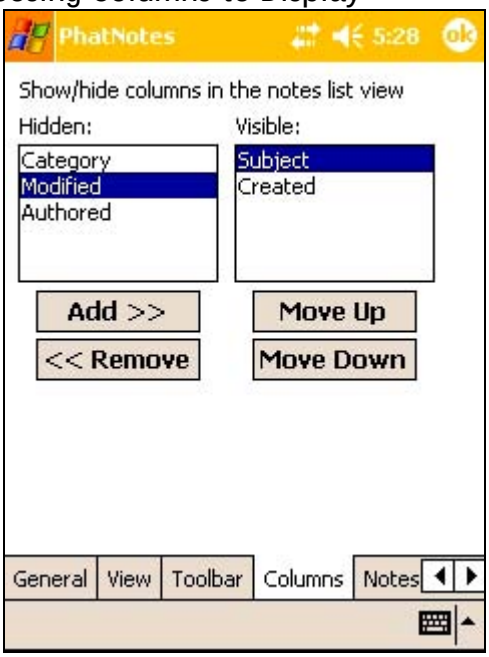

Figure 52. Options dialog box: Columns property sheet.

1. To choose which columns to display in the notes list and in what order, switch to the **Columns** property sheet of the Options dialog box (see figure 52).
2. To add a column to the view list, select the desired column from the **Hidden** list and press the **Add** button.
3. To remove a column from the view list, select the desired column in the **Visible** list and press the **Remove** button.
4. To change the column order, select the column in the **Visible** list and press **Move Up** or **Move Down** button.

Notes List

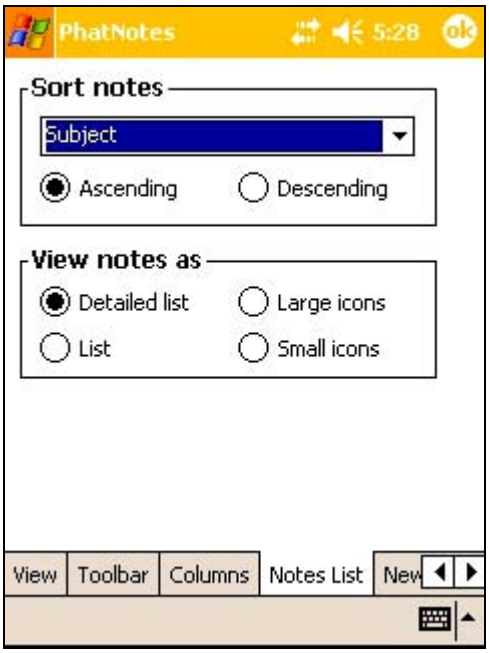

Figure 53. Options dialog box: Notes List property sheet.

1. To change the columns sort order, switch to the **Notes List** property sheet of the **Options** dialog box (see figure 53). The **Notes List** property sheet can be also used to sort by hidden columns.
2. To sort notes by a specific field, select the desired field name from the drop down menu.
3. To sort notes in ascending order, select the **Ascending** option.
4. To sort notes in descending order, select the **Descending** option.

   Note: You can also sort by clicking on the desired column's header in the list view. See the *Sorting and Filtering Notes* section above for more information.

5. Choose **Detailed list** (default), **List**, **Large icons**, or **Small icons** option in the **View notes as** group to set your preferable notes view.

   Note: In all views except **Detailed list**, only the created date and note color will appear.

New Note Settings

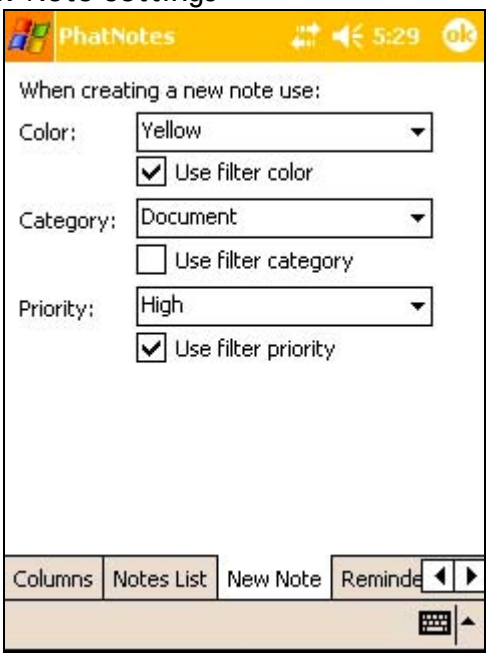

Figure 54. Options dialog box: New Note property sheet.

1. Switch to the **New Note** property sheet (see figure 54).
2. Use **When creating a new note use** group to specify the default color, category, and priority that will be used when a new note is created.
   - Select the default note's color from the **Color** drop down menu. Check the **Use Filter Color** box to use the current filter color instead. This option will work only if the color filter is used at the time a new note is created. See the "*Sorting and Filtering Notes*" section for more information.
   - Select the default note's category from the **Category** drop down menu. Check the **Use Filter Category** box to use the current filter category instead. This option will work only if the category filter is used at the time a new note is created. See the "*Sorting and Filtering Notes*" section for more information.
   - Select the default note's priority from the **Priority** drop down menu. Check the **Use Filter Priority** box to use the current filter's priority instead. This option will work only if the priority filter is used at the time a new note is created. See the "*Sorting and Filtering Notes*" section for more information.

Setting Reminders

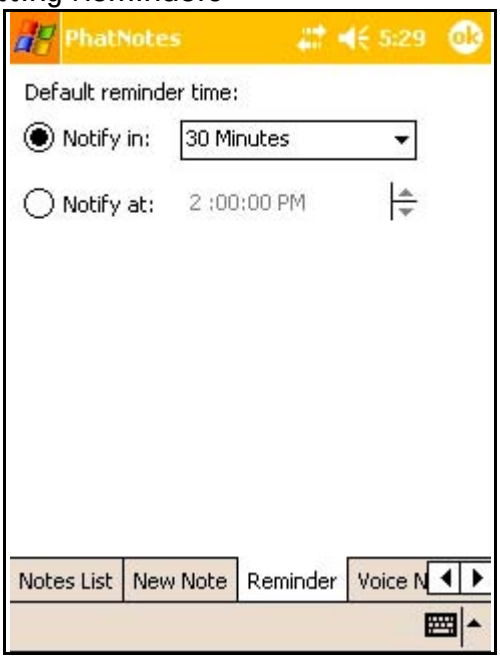

Figure 55. Options dialog box: Reminder property sheet.

1. To specify a default reminder time, switch to the **Reminder** property sheet (see figure 55).
2. To set the default time offset for the reminder, select **Notify in** and choose a time offset from the drop down menu below.
3. To set the default reminder time of the day, select **Notify at** and enter the time in the box.

This time can be changed later when inserting a Reminder. See the *Inserting Reminders* section above for more information.

Voice Notes Options

1. To set/modify the default settings of your voice notes, switch to the **Voice Notes** property sheet (see figure 56).

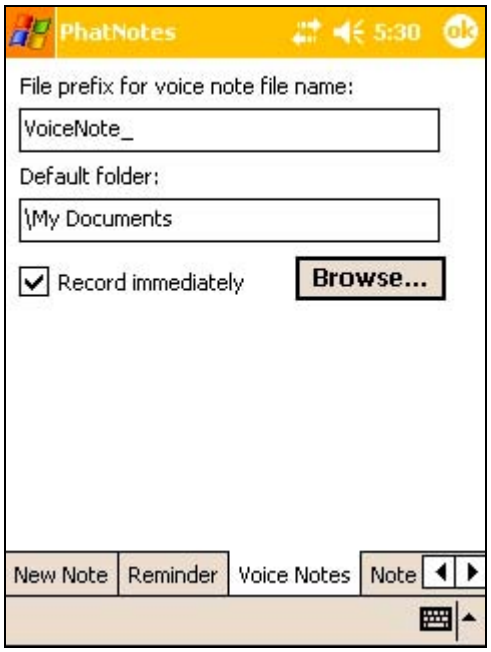

Figure 56. Options dialog box: Voice Notes property sheet.

2. **File prefix for voice note file name** - Allows you to choose the prefix for all .wav audio files created. The filename suffix will be the current date and time.
3. **Default folder –** Allows you to choose the folder where all voice notes audio files will be located. Click on the **Browse** button to select the default folder and location.
4. **Record immediately –** Check this box to automatically start recording as soon as you tap on the **Voice** item from the **Insert** menu. Uncheck this box if you want to start recording by tapping the record button.

Note Editor Options

1. To set/modify the default settings of a new task or appointment, switch to the **Note Editor** property sheet (see figure 57).

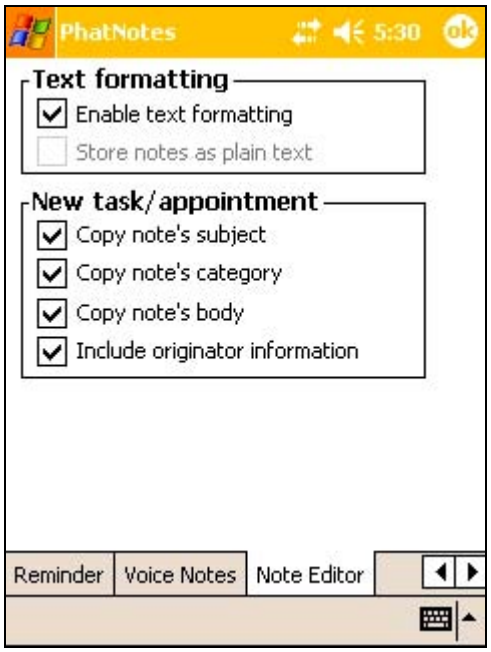

Figure 57. Options dialog box: Note Editor property sheet.

2. Check the **Enable text formatting** box to be able to create formatted notes. See the "Formatting text" section for more information. If this option is checked, all notes are stored in the database in RTF format.
3. If the **Enable text formatting** box is not checked, you can check the **Store notes as plain text** box. In this case, any formatted notes (RTF) will be converted to plain text.
4. **Copy note's subject -** check this box if you want PhatNotes to automatically copy the note's subject or the currently selected text in the note's body to the subject field of a new Appointment or Task. This field is **limited to 4K** characters.
5. **Copy note's category** - check this box if you want PhatNotes to automatically copy the note's category to the category field of a new Appointment or Task.
6. **Copy note's body** - check this box if you want PhatNotes to automatically copy the note's body to the note field of a new Appointment or Task. The note text is **limited to 6K** characters.
7. **Include originator information** - check this box if you want PhatNotes to add basic information about the note (such as program name, database name, category, subject, and creation date) to the note field of a new Appointment or Task.

See the *Creating a New Appointment and Task* section above for instructions how to create a new appointment or task.

Changing the Default Font

You can also choose a default font to display entries in the list view and the body text in the note editor.

1. To change the default font, choose the **Font** item from the **View** menu. The **Font** dialog box will appear (see figure 58).

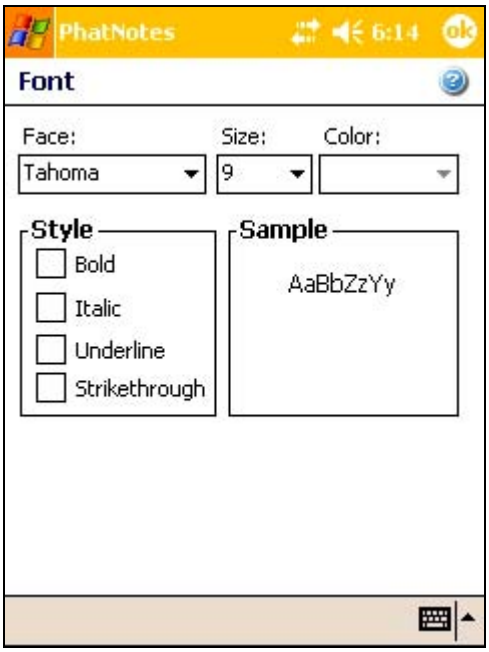

Figure 58. Font dialog box.

2. Select the font face you like from the **Face** list or enter the face name into the face box.
3. Select the font size you like from the **Size** list.
4. Choose the desired color from the **Color** drop-down color palette.
5. Choose the font style by checking **Bold**, **Italic**, and/or **Underline** boxes.
6. Tap **OK**.

Every time you change a font face, size, or style in the Font dialog box, the sample font will be automatically updated. This makes it easier to choose the desired font.

All settings, including column width, font name and size, etc., will be saved when you quit PhatNotes, and will be used when you run the program again.

Note: You cannot choose a default color (the dropdown menu shown above is grayed out). To change the color in a document, see the *Changing Fonts* section above.

PhatNotes Command-line Parameters

PhatNotes supports two command line parameters:

phatnotes.exe [database name]

-- or --

phatnotes.exe [-new]

Where:

database name is the name of the database you want to open when the program starts. If the database name is not specified, PhatNotes opens the last used database. The database name should not be mixed with any other

	options and must not include quotes, even if it contains space characters in the name. For example, to open a database called **PhatNotes**, enter the following command: **phatnotes.exe PhatNotes**
-new	can be used to launch (or activate) PhatNotes and create a new empty note at the same time. The note editor will appear automatically after the program is launched or activated.

Note: Programming user-defined hotkeys could be different on your mobile device. Please read the User's Guide that comes with your Pocket PC for information about how to program hotkeys.

Note: Some Pocket PCs don't support command-line parameters when programming quick launch keys. In this case you can create a shortcut with command line parameter(s) and call it instead.

Spell Checker Interface

Checking spelling

1. Choose the **Check Spelling** item from the Note Editor **Edit** menu. If no spelling errors are found "The spell check is complete" message will be displayed. When spell checker finds a possible error, the **Check Word** menu will appear (see figure 59).

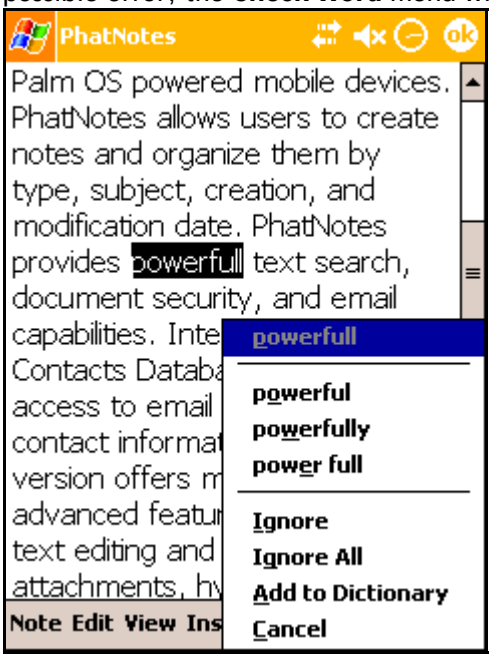

Figure 59. Check Word menu.

2. Select the correct word from the suggestion list (if any). You also can type in the replacement if no appropriate suggestions are found.

3. Tap **Ignore** or **Ignore All** to ignore the possible error.
4. Tap **Add to Dictionary** to add a new word to the user-defined dictionary.

Spell checker options

Choose the **Spelling Options** item from the Note Editor **Edit** menu. The **PhatSpell Options** dialog box will appear (see figure 60). The **PhatSpell Options** dialog box contains two property sheets: **General** and **Spelling**.

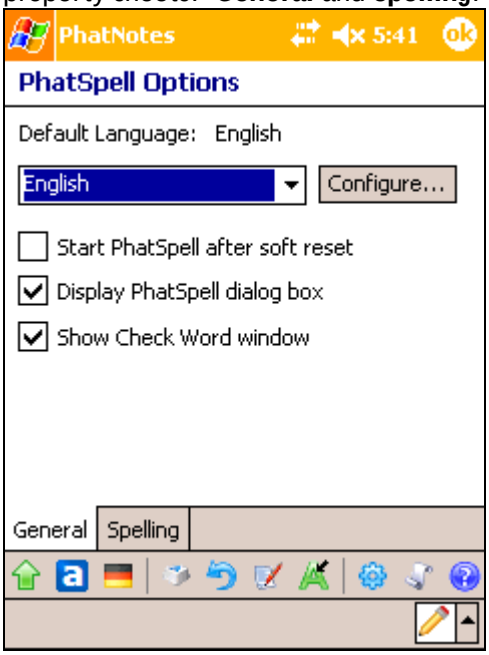

Figure 60. PhatSpell Options dialog box, General tab.

General Settings

1. Select the desired language from the drop-down menu.
2. If needed, tap **Configure** to bring up the **Language Configuration** dialog (see figure 61).

Figure 61. Language Configuration dialog box.

- You can modify the location of the main English and User dictionaries by editing the file names in the **Main** and **User** boxes. To browse the location of another dictionary, click on the ... button next to the appropriate dictionary. Tap **OK** when done.
- Tap on the **Edit** button to add or delete words from your user dictionary (see figure 62). Tap **OK** when done.

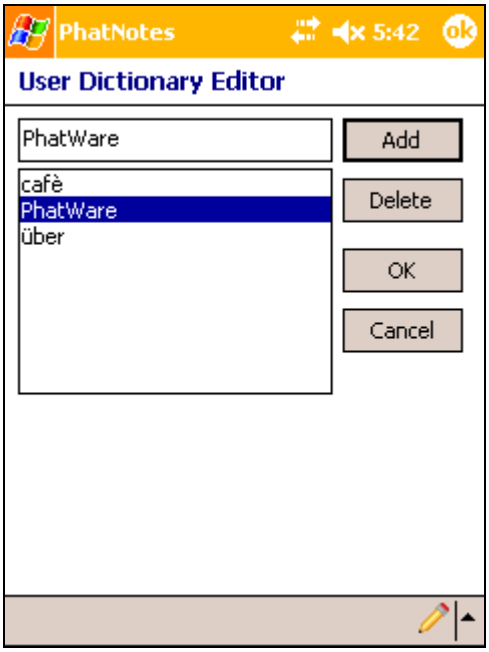

Figure 62. Language Configuration dialog box.

3. Check the **Start PhatSpell after soft reset** box to automatically start PhatSpell each time you restart the device.
4. Check the **Display PhatSpell dialog box** if you want to display the **PhatSpell** window when you tap on the spell checker icon. Otherwise, PhatSpell will immediately spell check the active document using the currently selected dictionary.
5. Check the **Show Check Word window** box to have the Check Word window appear instead of the Check Word popup menu (see figure 63).

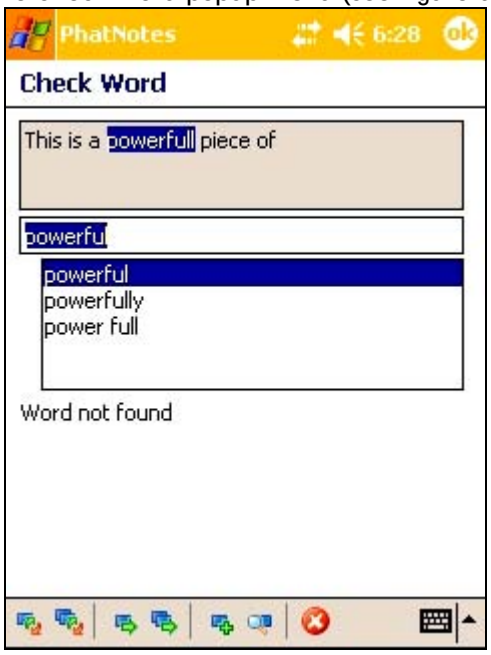

Figure 63. Check Word window.

- Select the correct word from the suggestion list (if any). You also can type in the replacement if no appropriate suggestions are found, then tap the **Replace** icon .
- If you want to replace the misspelled word throughout the entire document, tap the **Replace All** icon .
- Tap **Ignore** or **Ignore All** to ignore the possible error Spelling Settings.
- Tap the **Add to Dictionary** icon to add the highlighted word to the dictionary.
- Tap the View Suggestions icon to see additional replacement word(s) (if any).
- To cancel the spell checker, tap .

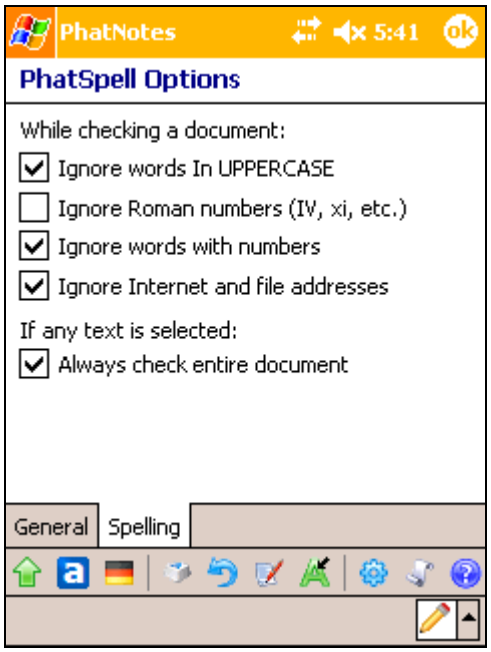

Figure 64. Spell Checker Options dialog box, Spelling tab.

Spelling Settings

1. Check the **Ignore words In UPPERCASE** box to ignore words in uppercase during a spelling check.
2. Check the **Ignore Roman numbers** box to ignore Roman number such as ii, iv, xii, IV, XIV, etc.
3. Check the **Ignore words with numbers** box to ignore words that contain numbers during a spelling check.
4. Check the **Ignore Internet and file addresses** box to automatically ignore Internet addresses, file names and electronic mail addresses during a spelling check. For example, check this box to ignore *http://www.phatware.com* during a spelling check.
5. Check **Always Check Entire Document** to spell check the entire document, regardless if a word or group of words is highlighted. If unchecked, only the highlighted items will be spell checked.
6. Tap **OK** when finished editing the spell checker options.

Today screen option

The PhatNotes Today screen option adds the latest PhatNotes to the Today screen (see Figure 65).

Figure 65.Today Screen.

- The *Today* Screen shows up to 20 last modified notes.
- Tapping on the PhatNotes icon creates a new note, while tapping on the title text opens the specified PhatNotes file.
- If you tap-and-hold on a note, a popup menu opens that allows you to rename, delete or duplicate notes directly from the today screen (see Figure 66).
    - If there are attachments or linked notes to the selected note, you can open an attachment or linked note by tapping on the **Attachments** or **Linked Notes** menu item, then tap on the attachment or linked note to open.

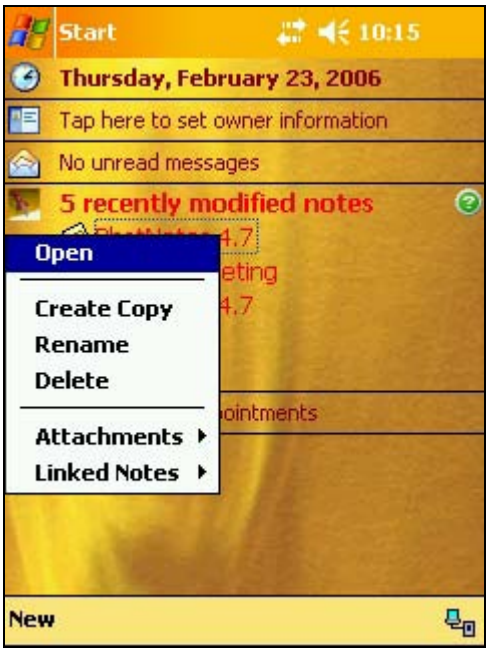

Figure 66. Today Screen popup menu.

- To rename a note, tap on the **Rename** menu item. The note title will change to an editable window, where you can directly type in the new name (see Figure 67).

Figure 67. Renaming a note in the Today Screen popup menu.

Note that this feature is **not** turned on by default, so you need to turn it on first. To do so, tap on the **Tools** menu and select **Options** (see the *View Options section*, above). Now check the **Today screen add-on** from the **General** tab.

You can change **Today** screen options by the following steps:

1. Tap on the **Start** button and select **Settings**.

2. From the **Personal** tab, tap the **Today** icon.
3. Tap the **Items** tab.
4. Select **PhatNotes** and tap the **Options** button (see figures 68 and 69).

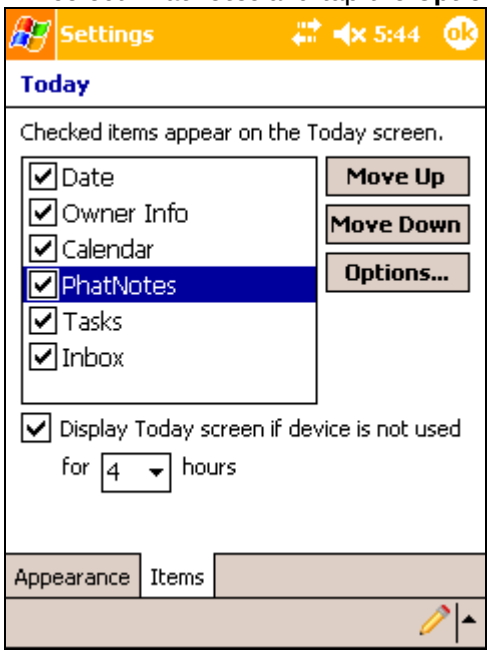

Figure 68.Today Settings Screen.

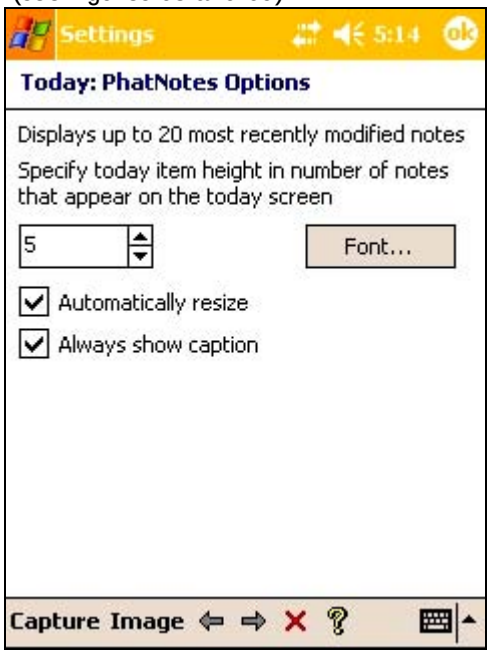

Figure 69.Today PhatNote Options Screen.

From the Options screen you can:

- Tap on the up or down arrows to change the number of items that appear on the today screen (from 2 to 20).
- Check the **Automatically resize** checkbox to automatically resize the item if there are less items than specified.
- Check the **Always show caption to** show the line of text that says how many modified notes there are and to show the **help** button.
- Tap on the **Font** button to change the font face, style, size and color on the today screen.

Palm Device Features

The Palm OS powered mobile devices have a different look and feel than Pocket PC devices. You can still create notes and provide them with category, subject, creation and modification date, which helps to find required information quickly and easily. You can still search for specific text in a specific field and sort notes by category, date, or subject, and protect notes from unauthorized access with a password, and send e-mail messages directly from the Note Editor.

Below are some of the major features found with the Palm OS powered device:

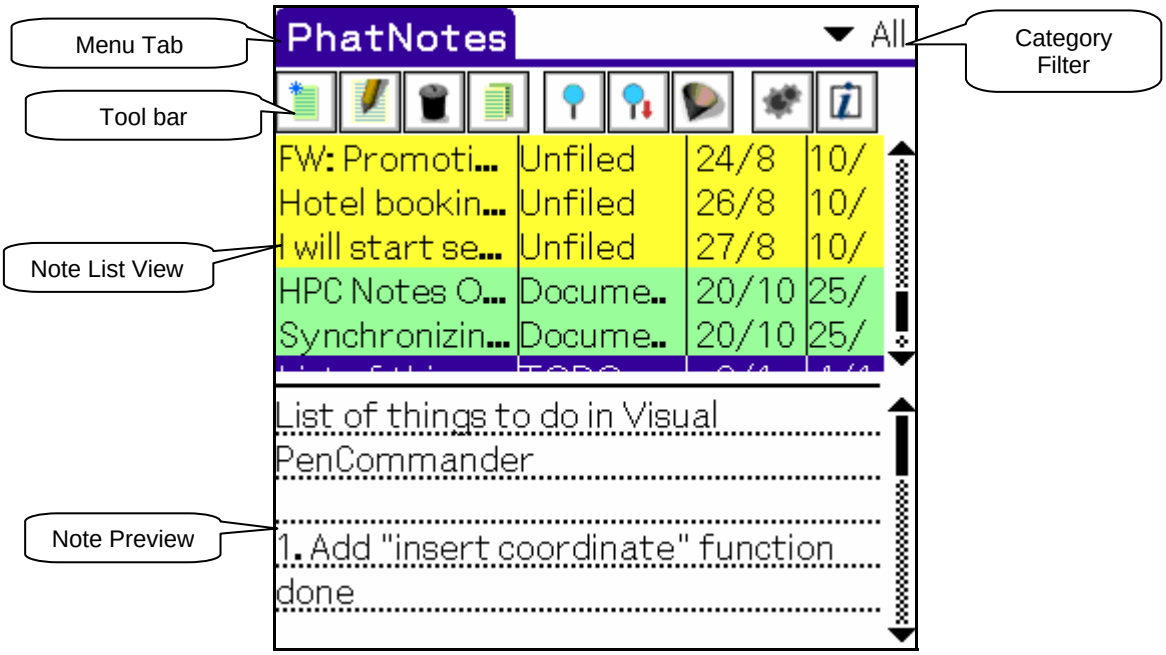

Figure 70. PhatNotes main screen (Palm).

Using the Command Bar

The main toolbar is shown in figure 71. The note editor toolbar is shown in figure 72.

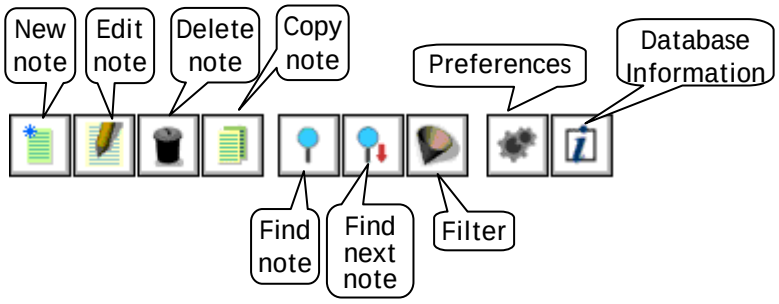

Figure 71. The main toolbar (Palm).

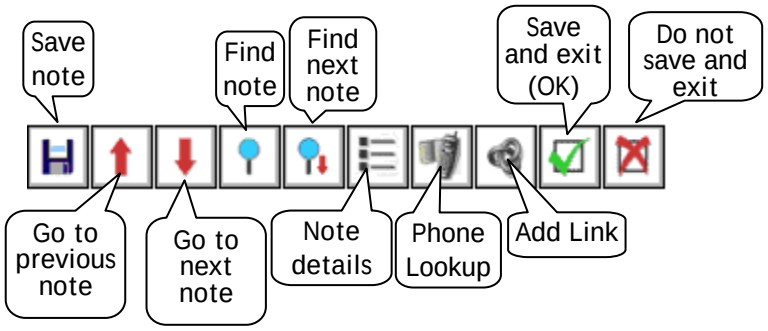

Figure 72. The note editor toolbar (Palm).

Working with Notes Databases

PhatNotes supports multiple databases. When you run PhatNotes for the first time, it will create a default empty database called PhatNotes.

Database Management

To create, delete, open, and rename notes databases, choose the **Note/Databases** menu item. The **Manage Databases** dialog box will appear (see figure 73).

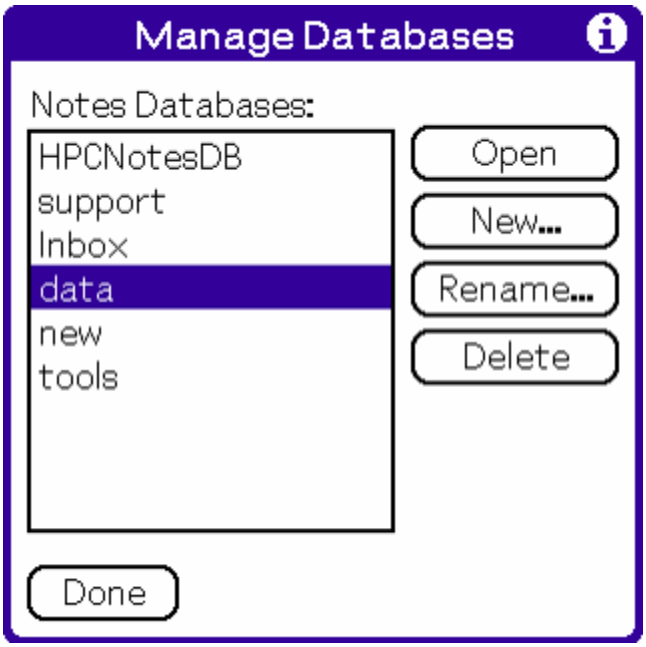

Figure 73. Manage Databases dialog box (Palm).

To copy notes between databases, choose the **Note/Copy Notes** menu item. The **Copy Notes** dialog box will appear (see figure 74). Select the note or notes you want to copy, from the Copy drop-down menu. Select the database you want to copy the note(s) to, or create a new database to copy the note(s) into.

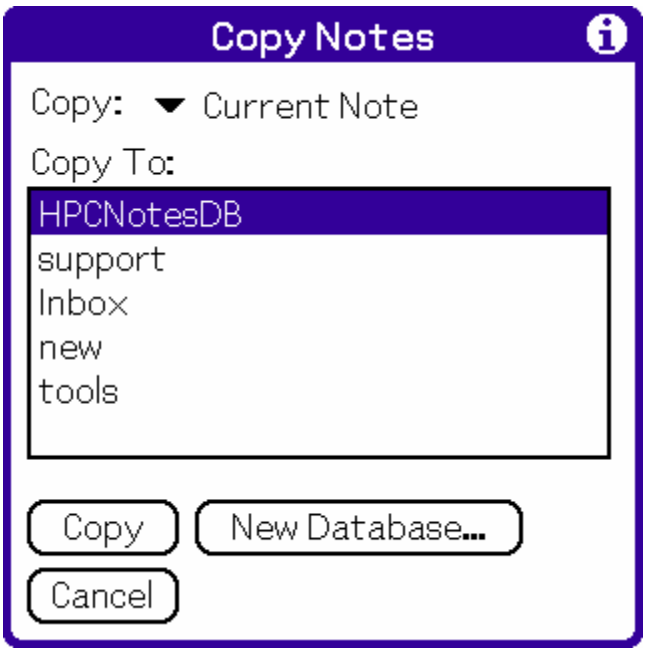

Figure 74. Copy notes dialog box (Palm).

To copy all memos from the Palm's **Memo** application, choose the **Note/Import Memo Database** menu item. The Import Memo Database dialog box appears (see figure 75). You can set the memos' filter and color preferences before copying.

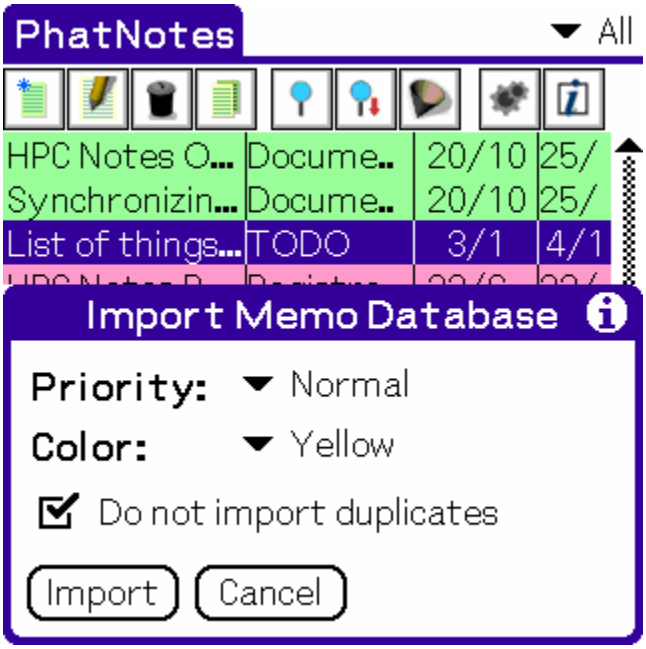

Figure 75. Import Memo Database dialog box (Palm).

Transferring notes between two Palm devices

You can transfer one or more selected notes between two Palm devices via infrared port.

To transfer notes via infrared port:

1. On the host device (device that will be sending data), select the note you wish to transfer.
2. On the client device (device that will be receiving data), make sure that **Beam Receive** is turned **on** from the device's **Preferences** application.
3. Choose the **Note/Beam Note** menu item.
4. The **Beam** dialog will appear (see figure 76) and will wait for a client device to be in infrared port range.

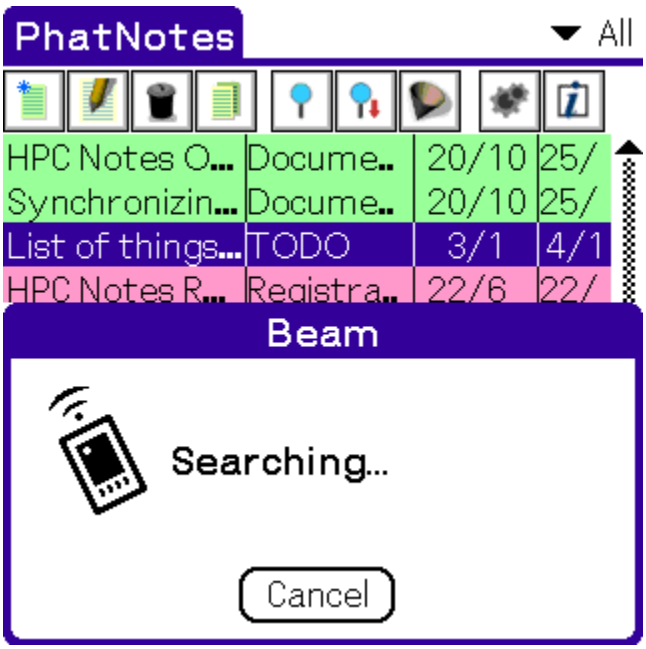

Figure 76. Beam dialog box (Palm).

5. Line up infrared ports of client and host Palm devices.
6. As soon as both devices "see" each other, connection will be established and transfer will begin.
7. To terminate transfer before completion, tap the **Cancel** button on the host device.
8. Upon successful completion of the transfer, a notification message will appear on both devices. If there was an error, an error message will appear.

Note: Make sure that the infrared ports are always lined up during transfer.

Database Editing Commands

To create a new note, tap the **New Note** icon in the main toolbar or choose the **Note/New Note** menu item. This will display the notes editor. To view the **Toolbar** and **Subject**, make sure these items in the **Tools** menu are selected. Choose the predefined note category from the drop-down menu or enter a new category by selecting **Edit Categories** from the drop-down menu, then tap on the **New** button. Once you've finished editing the note, tap **OK**. See "Working with the Note Editor" section for more information about editing notes.

After creating the note, it will appear in the note list. To edit the note, tap or double tap on the note entry in the list (depending on your **Preferences** settings).

To create a similar note with some minor modifications, select the note you want to create a copy of and choose the **Edit/Create Copy** menu item. It will create a copy of the selected note with the current creation and modification dates.

It is also possible to transfer the note to other applications such as Memo Pad. To do so, select the note you want to copy to another application and choose the **Edit/Copy** menu item. Run Memo Pad (or another application) and choose the **Edit/Paste** menu item. The note text will appear in the Memo Pad editor.

To delete one or more unwanted notes from the database, select the note you wish to delete and choose the **Edit/Delete Note** menu item. You can also delete all notes of the currently selected filter or category with the **Edit/Delete Multiple Notes** menu item. PhatNotes will ask you to confirm the deletion. *This operation cannot be undone!*

To protect and encrypt notes:

> **Note:** You must set security settings such as assigning a password and privacy levels from the Palm's **Security** application.

1. Select a note and choose the **Edit/Protect Note** menu item.
2. A confirmation dialog box will appear. Tap **OK**.
3. In the Main Screen, the note will now appear with a key icon if the security setting has been set to **Mask Records**, or will be hidden if the security setting has been set to **Hide Records**.
4. To unprotect a note, the security setting must first be set to **Show Records**. Then choose the **Edit/Protect Note** menu item.
5. A confirmation dialog box will appear. Tap **OK**.

Sorting and Filtering Notes

PhatNotes allows you to sort notes by subject, category, priority, create date, modification date, and authoring date in ascending or descending order. You can also change the sort order using the **Preferences** dialog box (see the "PhatNotes Settings" section). The current sort field and sort order will automatically be saved when you quit PhatNotes. When you start the program again, it will use the same sort and filter options.

To filter notes:

1. Choose the **Filter** item from the **Tools** menu or tap on the filter button. The **Filter** dialog box will appear (see figure 77).

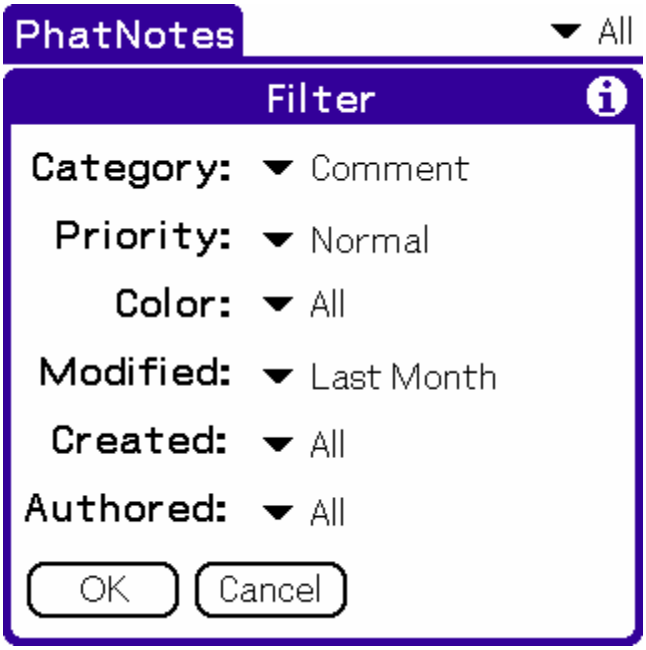

Figure 77. Filter dialog box (Palm).

2. To apply a filter, select the options from any of the drop-down lists.
3. Tap **OK**.

Finding a Specific Note

You can find a note that contains the specific characters or words in the notes database using the **Find** command.

To find a note that contains specific text in the current database:

1. Choose the **Find Note** item in the **Edit** menu. The **Find Note** dialog box will appear (see figure 78).

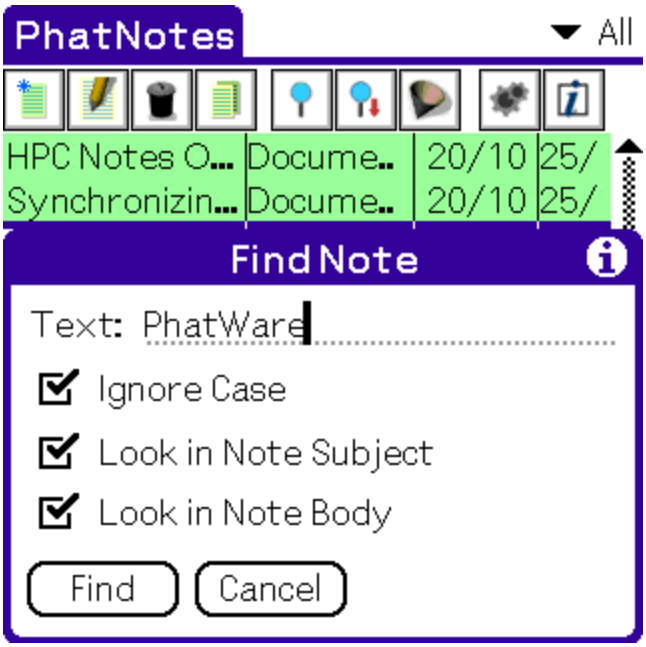

Figure 78. Find Note dialog box (Palm).

2. Enter the specific characters or word you wish to find in the **Text** box.
3. For a case sensitive search, uncheck the **Ignore Case** box.
4. Choose the fields in which you want to find these characters or words.
5. Tap **Find** to find a note with the entered characters or word.
6. To find the next note, choose the **Edit/Find Next** menu item.

Working with the Note Editor

To create a new note, tap on the **New Note** icon in the main toolbar or choose the **Note/New Note** menu item. To edit an existing note, tap or double tap on the desired note in the note list (depending on the preference setting). The Note Editor window will be displayed (see figure 79).

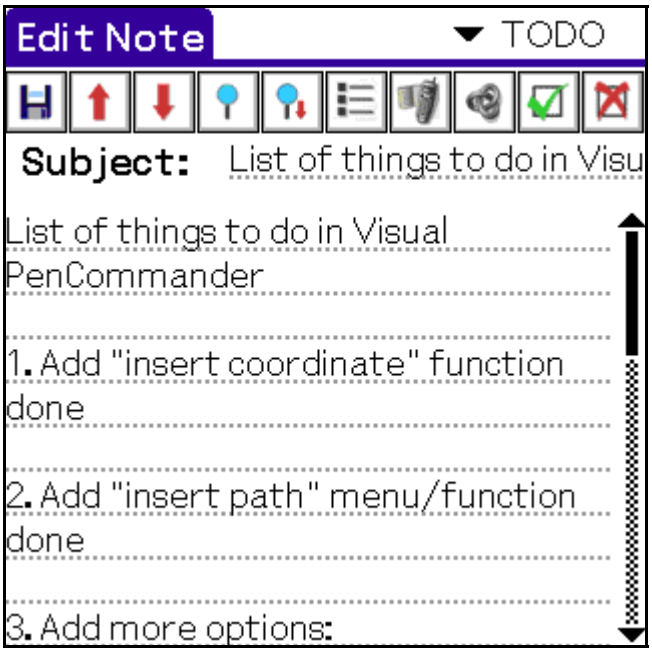

Figure 79. Note Editor Window (Palm).

When creating a new note, enter the note's subject into the **Subject** field and enter text into the note **Body** field.

If you are not using the subject field, you can hide these fields using the **Tools/View Subject** menu item. To show the subject field, use the same command again.

The note editor provides standard editor functionality such as Delete, Cut, Copy, and Paste text. These commands are applied to the note field only. These commands can be found in the **Edit** menu.

You can also undo the last editing operation by choosing the **Undo** item from the **Edit**.

Finding and replacing text

With the Note Editor, you can search for specific text. To find specific characters or words:

1. Choose the **Find** item from the **Edit** menu. The **Find** dialog box will appear (see figure 80).

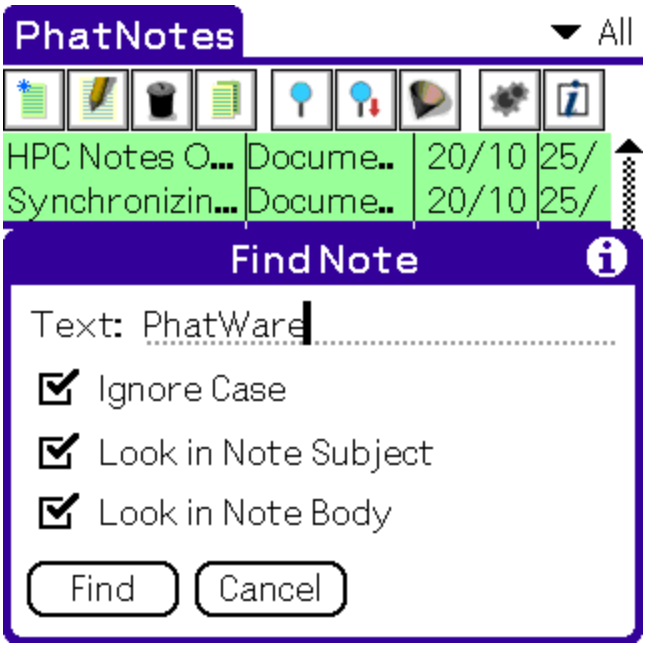

Figure 80. Find Text dialog box.

2. In the **Text** box, type the characters or words you want to find. Uncheck the **Ignore Case** box for a case sensitive search. Choose to look in the note subject or body, or both.
3. Tap **Find**. If found, the text will be highlighted.
4. Choose **Find Next** from the **Edit** menu to find the next occurrence of this text.

Sending email messages from PhatNotes

The notes editor allows you to send email messages directly from PhatNotes.

To send the note as an email message:

1. Choose the **Send Mail** item from the **Note** menu, either from the Main screen or Note Editor screen. The **Send Note** dialog will appear (see figure 81).

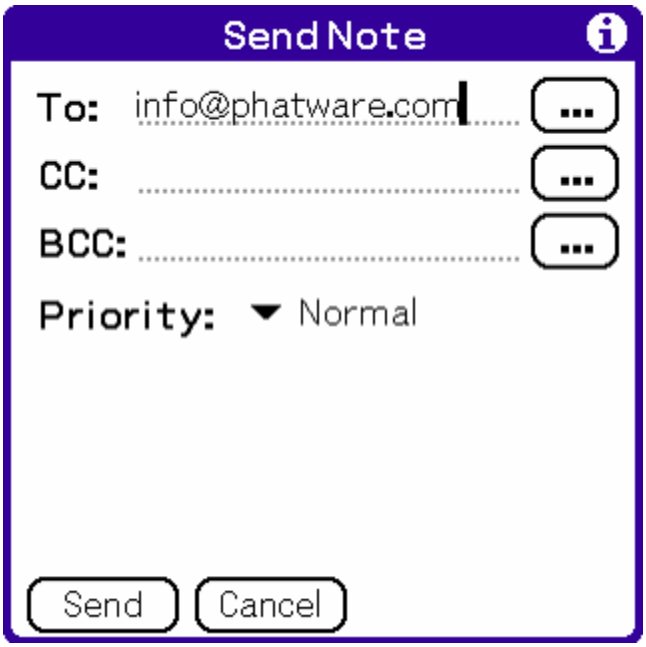

Figure 81. Send Note dialog box.

2. Enter the desired email address in the **To** box. PhatNotes provides a quick access to email addresses stored in the contacts database. Tap the ... button to view the list of names and email addresses stored in the contacts database.
3. Select the desired email address from the list and tap **Select**. The email address will appear in the **To** box
4. If you want to CC and BCC the same message, enter email addresses into **CC** and **BCC** boxes.
5. Select the e-mail priority.
6. Tap **Send**.

The email message will be placed in the Outbox of your email client. It will be sent the next time you connect to the mail server or synchronize with the desktop PC depending on which mail service has been used.

Inserting Notifications

To insert a user notification:

1. Choose the **Insert Notification** item from the **Edit** menu. The **Notification** dialog box will appear (see figure 82).

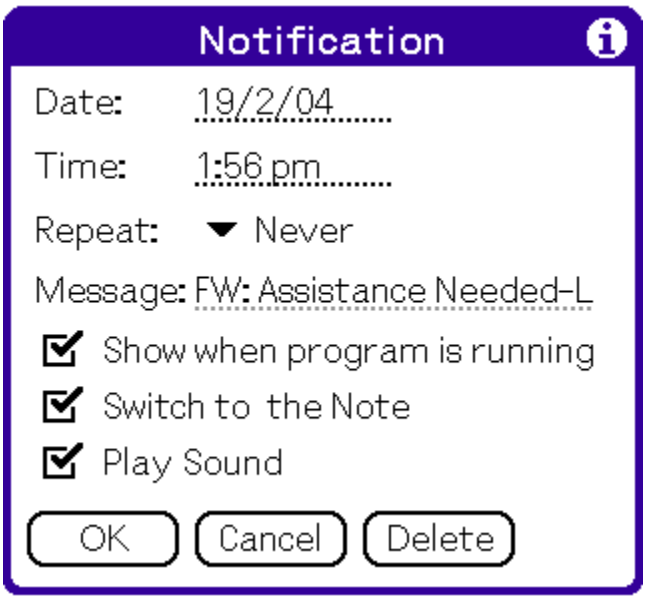

Figure 82. Notification dialog box (Palm).

2. To enter a date and time, tap on each field. Select the desired date and time from the **Notification Date** and **Time** windows.
3. Select the notification frequency from the **Repeat** drop-down menu.
4. Enter notification text into the **Message** field. The note's subject initially appears in this field automatically.
5. Choose the other options available.
6. Tap **OK**.

A note that contains a notification will be marked with a *clock* icon in the Main Screen until the notification goes off.

To remove the notification, tap the **Delete** button in the **Notification** dialog box.

Note: Only one notification can be associated per note.

Deleting notes

From the currently opened note, you can delete it by choosing the **Delete Note** item from the **Note** menu. You can also delete notes from the Main Screen by choosing **Delete Note** from the **Edit** menu. In both cases, you will receive a Warning message before the note is permanently deleted.

Inserting names and phone numbers

To insert a contact name and associated phone number from the Palm's Address Book application into a note's body:

1. Choose the **Phone Lookup** item from the **Tools** Menu. The **Lookup** dialog box will appear.
2. Select a contact from the list.

3. Tap **Add**.

Contact information will be inserted at the current cursor location.

Notes Linking

PhatNotes allows a user to attach a shortcut to any other note.

To insert a link to another note:

1. Open the note you want to create a link for.
2. Choose the **Insert Link** item from the **Edit** menu or click on the **Add Link** icon in the Note Editor toolbar and select **Add Link**. A dialog box with the list of notes will appear (see figure 83).

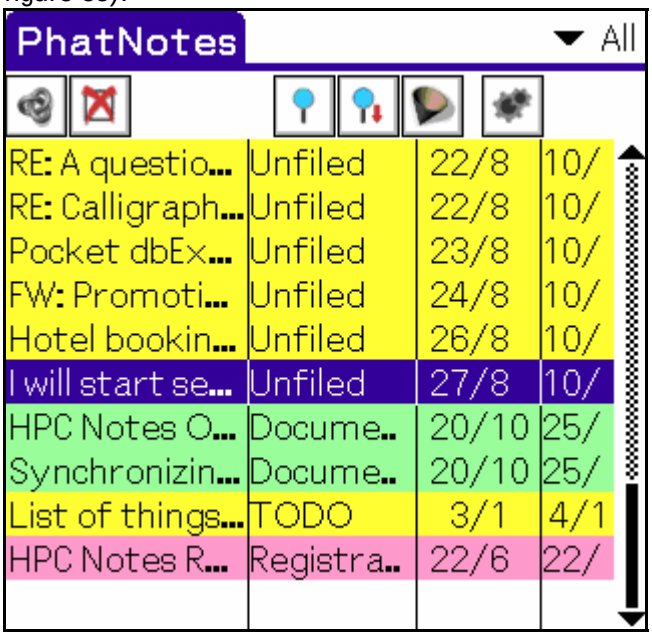
PhatNotes
All
RE: A questio... Unfiled 22/8 10/
RE: Calligraph... Unfiled 22/8 10/
Pocket dbEx... Unfiled 23/8 10/
FW: Promoti... Unfiled 24/8 10/
Hotel bookin... Unfiled 26/8 10/
I will start se... Unfiled 27/8 10/
HPC Notes O... Docume.. 20/10 25/
Synchronizin... Docume.. 20/10 25/
List of things... TODO 3/1 4/1
HPC Notes R... Registra.. 22/6 22/

Figure 83. Link Note dialog box.

3. Tap on the note you want to link.
4. Click on the **Add link** icon or select **Link Note** from the **Link** menu.
5. To return to the note without linking, tap on the **Return to Note Editor** button .
6. To go to a linked note, tap on the **Add Link** icon. The list of linked notes will appear.
7. Tap on the note you want to open.
8. To remove a link, tap on the **Add Link** icon and select **Remove Link**.

PhatNotes Settings

You can customize the PhatNotes view and the default settings by changing various parameters in the **Preferences** dialog box. To display the **Preferences** dialog box, choose the **Tools/**

Preferences command in the main menu. The **Preferences** dialog box contains the following property sheets: **General**, **Sorting**, **Columns**, and **New Note**.

General Options

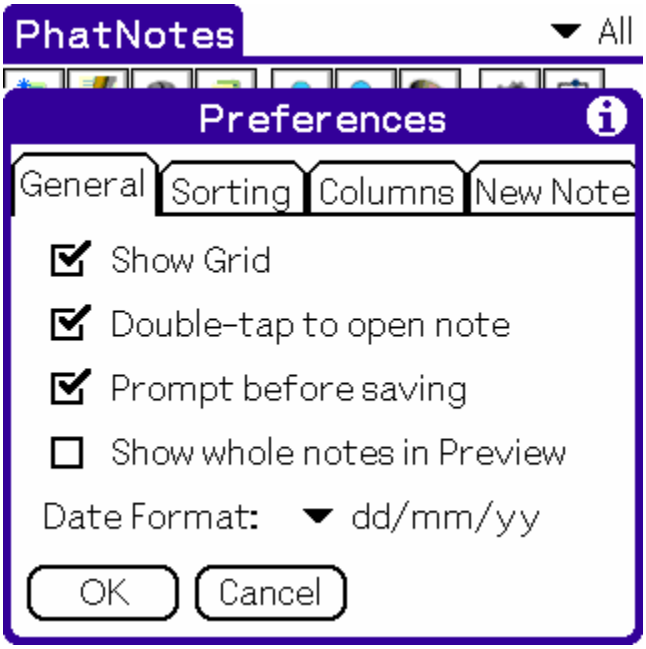

Figure 84. Preferences dialog box: General property sheet (Palm)

1. Switch to the **General** property sheet (see figure 84).
2. Check **Show Grid** to display the vertical lines between columns.
3. Check **Double-tap to open note** if you want to double-tap to open a note instead of a single tap.
4. Check **Prompt before saving** to receive a warning message while attempting to close a changed note.
5. Check **Show whole notes in Preview** to show the complete contents of a selected note in the Preview Window. If unchecked, only the first 3000 characters will be displayed.
6. Select the desired date format from the **Date Format** drop-down menu.

Sorting Settings

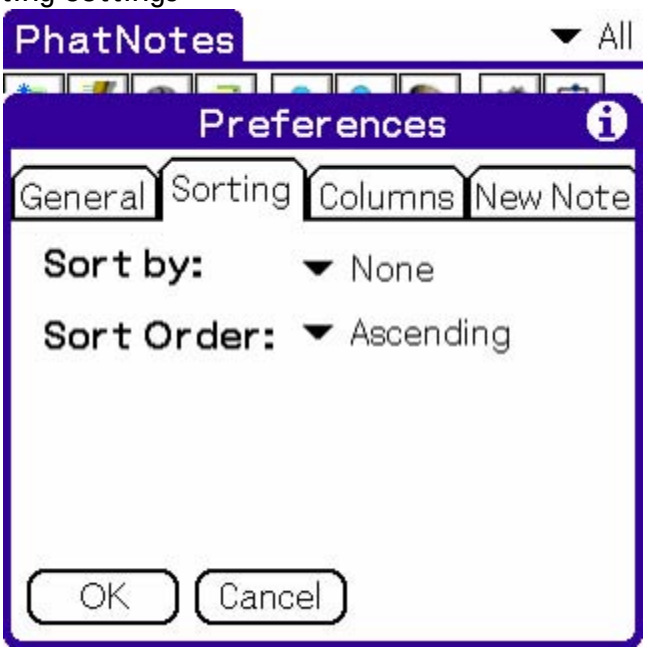

Figure 85. Preferences dialog box: Sorting property sheet (Palm)

1. To change the sort order, switch to the **Sorting** property sheet of the **Preferences** dialog box (see figure 85).
2. To sort notes by a specific field, select the desired field name from the drop down menu.
3. To sort notes in ascending order, select the **Ascending** option.
4. To sort notes in descending order, select the **Descending** option.

Columns Settings

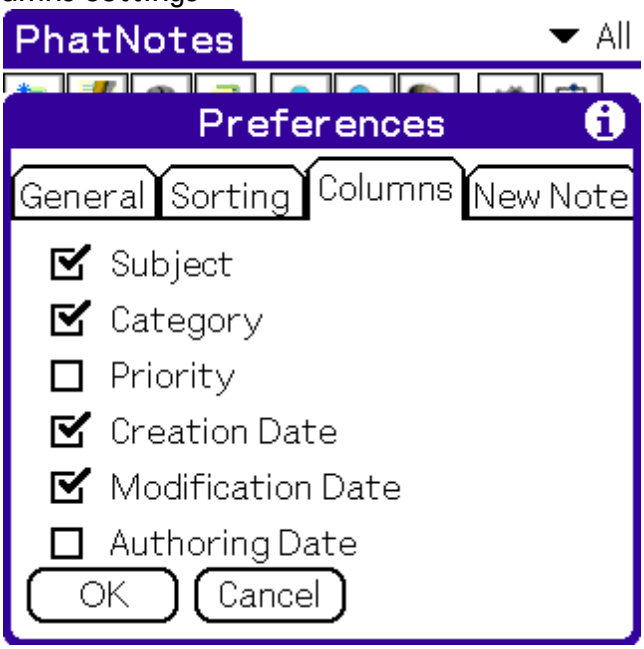

Figure 86. Preferences dialog box: Columns property sheet (Palm)

1. To choose which columns to display in the notes list, switch to the **Columns** property sheet of the Options dialog box (see figure 86).
2. To add a column to the view list, select the desired column.

New Note Settings

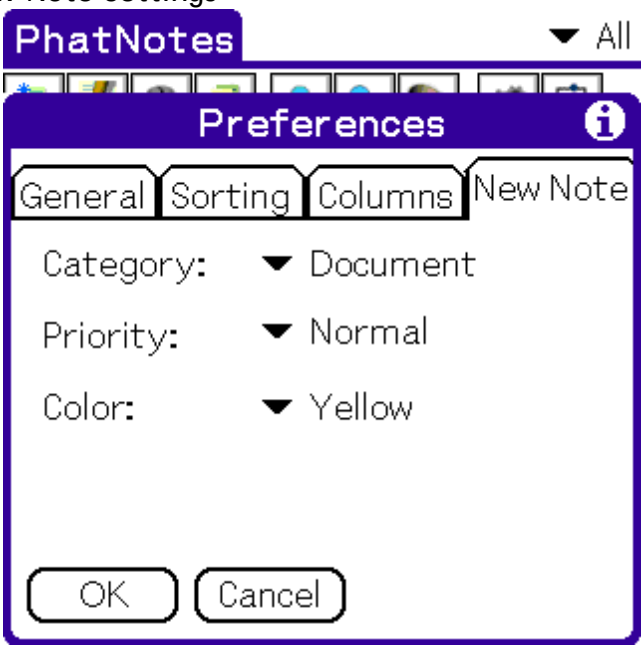

Figure 87. Preferences dialog box: New Note property sheet (Palm)

1. Switch to the **New Note** property sheet (see figure 87).
2. Select the default note's category, priority, and color from the drop down menus. If any filter settings are active, they will take precedence. See the "*Sorting and Filtering Notes*" section for more information.

Changing the Default Font Size

You can choose to display different default font sizes for both the Main window and note editor Window

1. To change the default font of either window, choose the **Font** item from the **Tools** menu. The **Font** dialog box will appear (see figure 88).

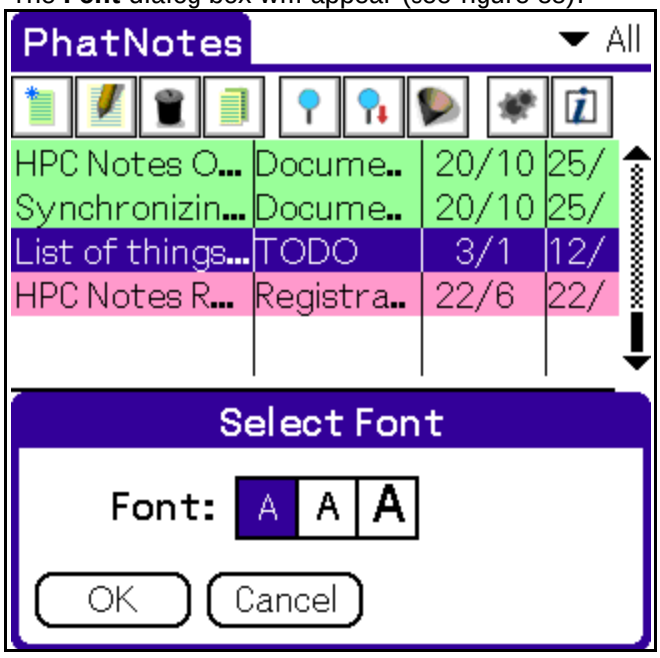

Figure 88. Select Font dialog box (Palm).

2. Select the font size you prefer.
3. Tap **OK**.

The selected font size will be saved when you quit PhatNotes, and will be used when you run the program again.

Desktop PC Features

PhatNotes Main Screen

The PhatNotes main screen is shown in figure 89. It contains the menu bar, the toolbar, the shortcut bar, the note list view and header, the note preview and header, and the status bar.

You can toggle the appearance of the toolbar, the status bar, the shortcut bar, and note preview using the commands in the View menu.

When running the application for the first time, the note list view will be empty. After you begin creating notes they will appear in the note list view.

The note list view header displays the field's names and also can be used to sort notes (see "Sorting and filtering notes" section) or adjust the size of the columns. To change the size of a column, click and drag the divider in the column heading.

If selected in the Options dialog, you can also move notes to another folder by dragging the notes shown in the note list view, into another folder or database icon shown in the shortcut bar. To copy a note into another folder, hold down the Ctrl key while dragging.

The note preview header can also be toggled on or off either by double-clicking on it or right-clicking and deselecting the **View Header** command.

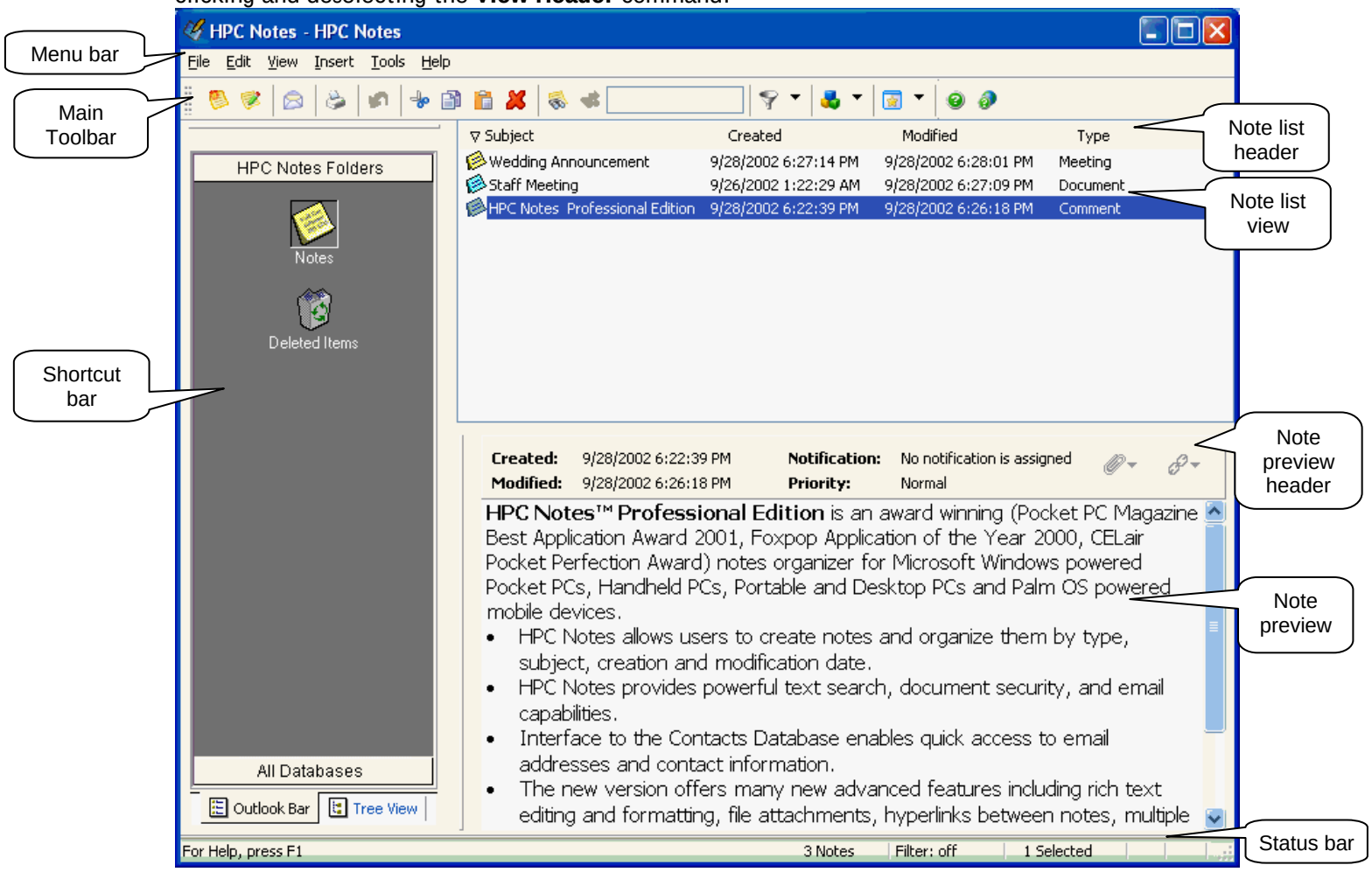
Menu bar
Main Toolbar
Shortcut bar
Note list header
Note list view
Note preview header
Note preview
Status bar
HPC Notes - HPC Notes
File Edit View Insert Tools Help
HPC Notes Folders
Notes
Deleted Items
All Databases
Outlook Bar
Tree View
Subject
Created
Modified
Type
Wedding Announcement 9/28/2002 6:27:14 PM 9/28/2002 6:28:01 PM Meeting
Staff Meeting 9/26/2002 1:22:29 AM 9/28/2002 6:27:09 PM Document
HPC Notes Professional Edition 9/28/2002 6:22:39 PM 9/28/2002 6:26:18 PM Comment
Created: 9/28/2002 6:22:39 PM
Modified: 9/28/2002 6:26:18 PM
Notification: No notification is assigned
Priority: Normal
HPC Notes™ Professional Edition is an award winning (Pocket PC Magazine Best Application Award 2001, Foxpop Application of the Year 2000, CELair Pocket Perfection Award) notes organizer for Microsoft Windows powered Pocket PCs, Handheld PCs, Portable and Desktop PCs and Palm OS powered mobile devices.
HPC Notes allows users to create notes and organize them by type, subject, creation and modification date.
HPC Notes provides powerful text search, document security, and email capabilities.
Interface to the Contacts Database enables quick access to email addresses and contact information.
The new version offers many new advanced features including rich text editing and formatting, file attachments, hyperlinks between notes, multiple
For Help, press F1
3 Notes
Filter: off
1 Selected

Figure 89. Main Screen.

PhatNotes toolbars

PhatNotes toolbars provide quick mouse access to many tools used in PhatNotes. To customize the contents of the toolbars, hide or display toolbars, or create new toolbars, use the Customize command from the Tools menu. (See figure 90.)

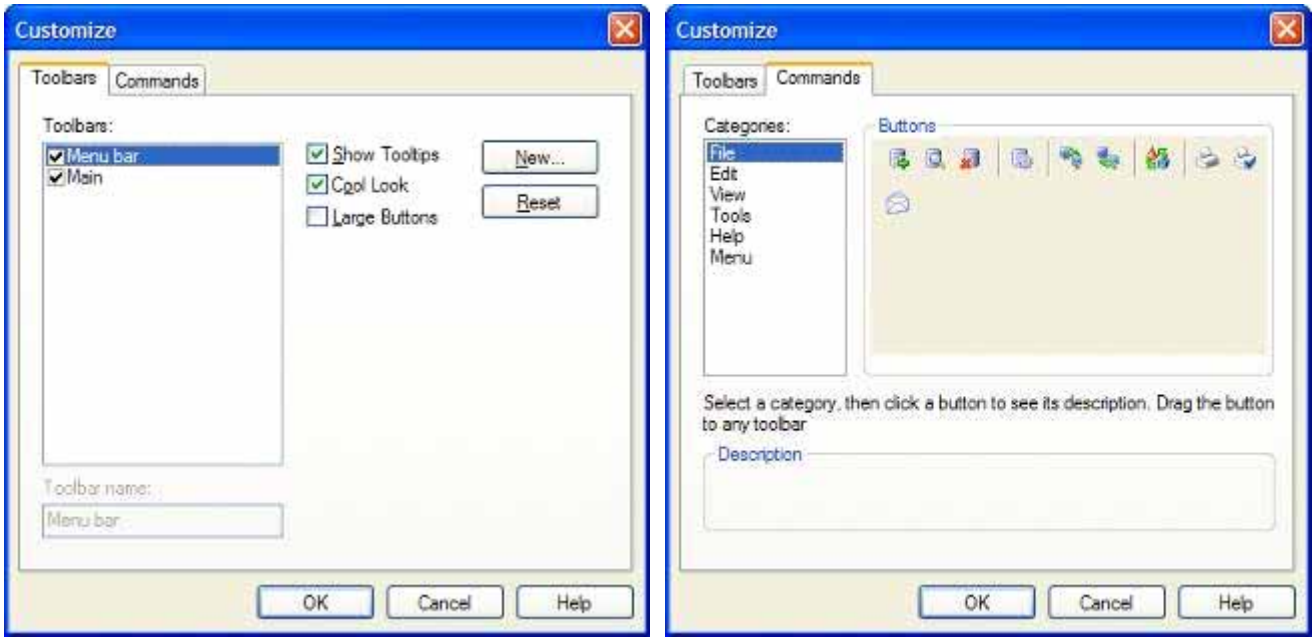

Figure 90. Customize Dialogs.

When dragging a toolbar, the rectangle is displayed indicating the position of the toolbar. Release the mouse button to move the toolbar to the displayed position.

The main toolbar is shown in figure 91. The note editor toolbar is shown in figure 92. (See the *Working With the Note Editor* Section, below.)

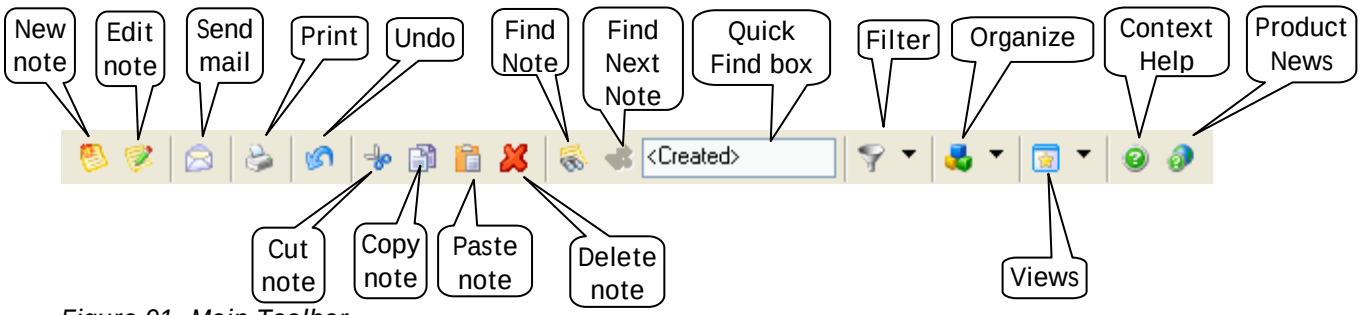

Figure 91. Main Toolbar.

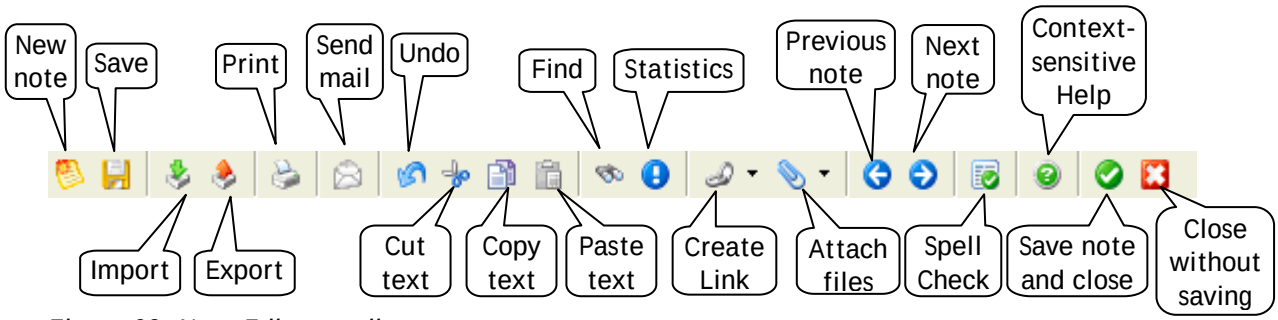

Figure 92. Note Editor toolbar.

Working with Notes Databases

PhatNotes supports multiple databases. When you run PhatNotes for the first time it will create a default empty database file called *PhatNotes.wnt*. The program keeps all databases in this file. By default, it is located in the *My Documents* folder (if you use Windows NT 4.0, it is located in your *Personal* folder).

Database Management

PhatNotes supports the following database management functionality:

Creating a new notes database. To create a new notes database, choose **File/Database/Create** menu item. The **Create Database** dialog box will appear (see figure 93). Enter the desired database name and click OK. If a database with the same name already exists you will be asked to choose another name. If you want to assign a new database to a group, enter or select the desired group name. The new group name will appear in the shortcut bar (see figure 94).

Note: ActiveSync cannot synchronize empty databases, so when you create a new empty database on the desktop PC, it will not synchronize with the mobile device until this new database contains at least one note.

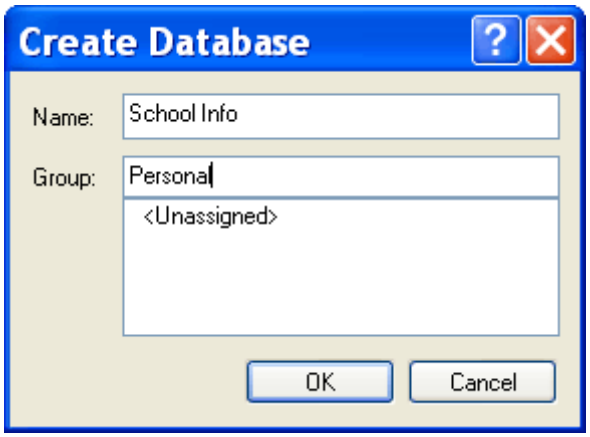

Figure 93. Create Database dialog box.

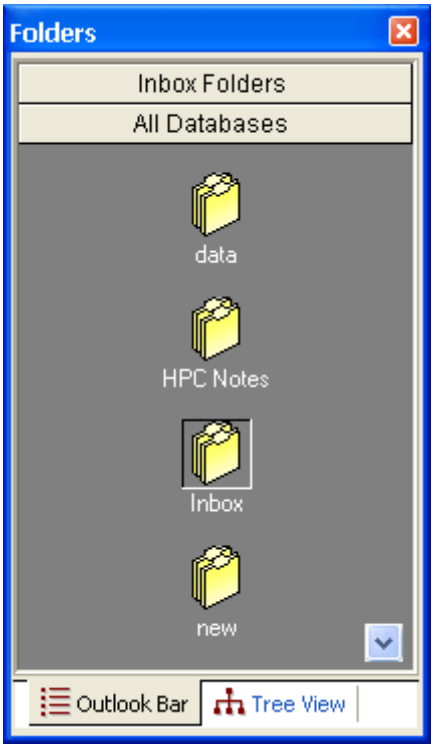

Figure 94. Shortcut bar with new database group.

Opening an existing notes database. To open an existing database, choose **File/Database/Open** menu item. The **Open Database** dialog box will appear (see figure

95). Select the desired database in the **Available notes Databases** list and click **Open**. You can also open a database by clicking on the desired database icon in the shortcut bar.

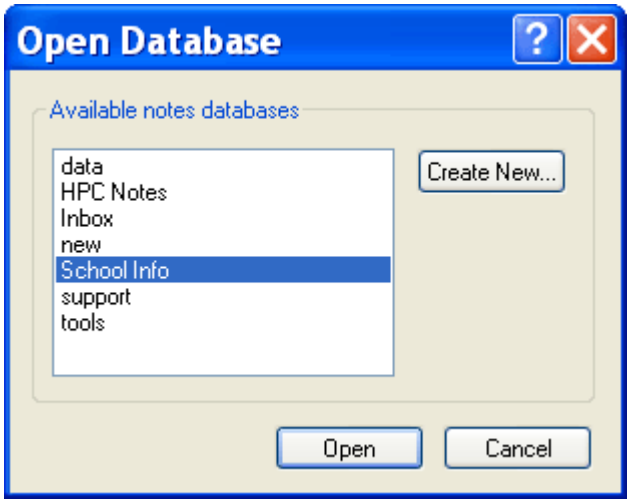

Figure 95. Open Database dialog box.

Grouping notes databases. To assign an existing database to a group, choose the **File/Database/Group** menu item. The **Group Databases** dialog box will appear (see figure 96). Enter or select the desired database name and group name to assign the database to. To remove a database from a group, select <Unassigned>.

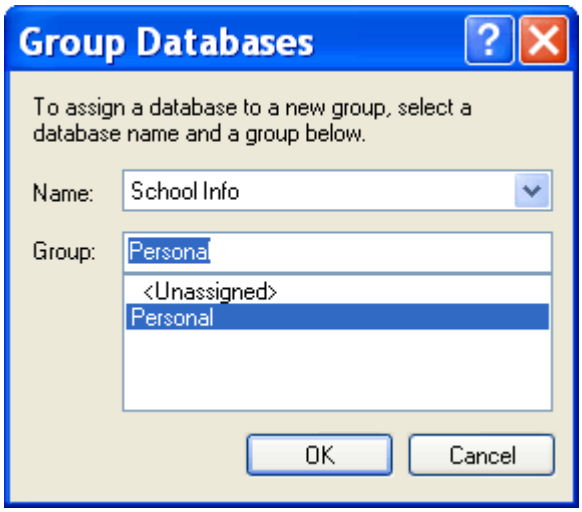

Figure 96. Group Databases dialog box.

Deleting a notes database. To delete a notes database, choose **File/Database/Delete** menu item. The **Delete Database** dialog will appear. Select the database you wish to delete and click **Delete**. PhatNotes will ask you to confirm this operation. Please note that the active database cannot be deleted. To delete the active database you should open another database using the **File/Database/Open** command first.

Note: You cannot delete a database on the desktop PC while the Pocket PC is connected and ActiveSync is running, because all databases are locked by the synchronization service. Before deleting a database, you must disconnect your Pocket PC first. When you synchronize next time, ActiveSync will attempt to delete the

database from the mobile device, however if it is use ActiveSync will fail to delete it. If this situation occurs, you will need to delete the old database manually.

WARNING We recommend that you make a complete backup of your database before you delete it, because this operation cannot be undone.

Renaming a notes database. To rename a notes database, open the database you want to rename and choose **File/Database/Rename** menu item. The **Rename Database** dialog will appear. Enter a new name for the selected database and click **OK**.

Note: You cannot rename a database on the desktop PC while the Pocket PC is connected and ActiveSync is running, because all databases are locked by the synchronization service. Before renaming a database, you must disconnect your Pocket PC first. When you synchronize next time, ActiveSync will attempt to rename the database on the mobile device, however if it is use an empty database with the old name will remain on your mobile device after the synchronization. If this situation occurs, you will need to delete the old database manually.

Emptying a notes database. To empty the active notes database, choose **File/Database/Empty** menu item. PhatNotes will ask you to confirm this operation. This operation is equal to deleting all notes from the Notes database.

WARNING The Empty Database operation cannot be undone, therefore, we recommend making a complete backup of the database before proceeding.

Copying notes between databases. To copy one or more selected notes to another database, choose **File/Database/Copy Notes** menu item. The **Copy Notes** dialog box will appear. If you want to move the selected notes instead of copying, check the Move Notes box. If you want to copy or move all notes from the current database to another one, check the All Notes box. Select the desired database from the To Database list and click **OK**. If you want to create a new database, click on the **Create New** button (see figure 97).

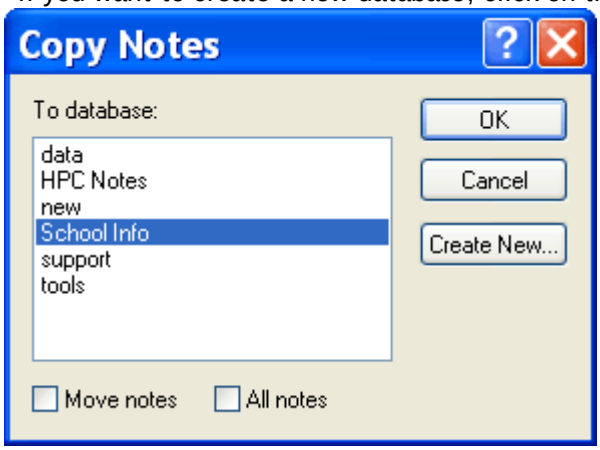

Figure 97. Copy Notes dialog box.

If the **Enable Drag and Drop** box is selected in the **Options** dialog, you can also move notes to another database by dragging the notes shown in the note list view, into another folder or database icon shown in the shortcut bar. To copy a note into another database, hold down the Ctrl key while dragging.

Synchronizing notes databases (Pro version only). PhatNotes Professional Edition synchronizes multiple databases automatically. When you create a new database on the mobile device or on the desktop PC, this database will be automatically added to the list. If ActiveSync is running it will be restarted automatically. Please note, however, that PhatNotes does not synchronize empty databases.

Backing Up and Restoring the Notes Database

With PhatNotes, you can backup one or more notes databases into a file.

To backup one or more notes databases:

1. Choose the **File/Database/Backup** menu item.
2. The **Backup Notes Wizard** dialog will appear.
3. In **Step 1** of the Wizard, enter the file name you want to backup your notes database to, or click on the **Browse** button to select a file.
4. Click **Next**.
5. **Step 2** of the Wizard allows you to enter the comment for your notes backup. You can also specify a password if you want your backup file to be password-protected.
6. Click **Next**.
7. In **Step 3** of the Wizard, to backup all notes databases, choose the **All Notes Databases** option. To backup the selected databases, choose the **Select Notes Databases** option, and then select one or more databases you wish to backup from the list.
8. Click **Next**.
9. In **Step 4** of the Wizard, you will see a progress dialog box while backup is in process. To stop the backup process before it finished, click the **Cancel** button in the Progress dialog box.
10. Click **Finish**.

To restore one or more databases from the backup file:

1. Choose the **File/Database/Restore** menu item.
2. The **Restore Notes Wizard** dialog will appear.
3. In **Step 1** of the Wizard, enter the file name you want to restore your notes database from, or click on the **Browse** button to select a file.
4. You can also check the **Delete all current notes before restoring** checkbox if you want to delete all notes databases before restoring.
5. Click **Next**.
6. **Step 2** of the Wizard allows you to view the comment from your notes backup. You will need to specify your password if you previously backed up the file with a password.
7. Click **Next.**
8. In **Step 3** of the Wizard, to restore all notes databases, choose the **All Notes Databases** option. To restore the selected databases, choose the **Select Notes Databases** option, and then select one or more databases you wish to restore from the list.
9. Click **Next.**

10. In **Step 4** of the Wizard, you will see a progress dialog box while restoring is in process. To stop the restore process before it finished, click the **Cancel** button in the **Progress** dialog box.

WARNING It is **not** recommended to cancel the restore procedure. Doing so may damage the data that is being restored.

To compress the database:

Every time you modify or create a note, new data is added to the PhatNotes database. When you delete notes on the desktop, the data is not removed from the database; only a reference to this data is removed. Therefore, the PhatNotes database file can only grow in time.

To compress the PhatNotes database to remove unused data, use the **File/Database/ Compress** menu command. This will save some disk space as well as improve PhatNotes performance.

Database Editing Commands

To create a new note, either select the **New Note** item from the **Edit** menu, or use the **Ctrl+N** keyboard shortcut, or click on the **New Note** icon in the main toolbar. This will display the **Note Editor** dialog box. Each note can be provided with category, subject, color, and priority. Choose the predefined category from the list or enter a new category in the **Category** field, enter the subject into the **Subject** field and then enter the note text itself. Use the TAB key or **Shift+TAB** to jump between fields. Once you've finished editing the note, click on the **Save** or **OK** button in the toolbar or select **Save** or **OK** in the File menu. See the "Working with notes editor" section for more information about editing notes.

After creating the first note, you can see it appear in the note list in the Main Screen. To edit the note, double click on the note entry in the list, or select the desired note in the list using the up or down arrow keys and press **Enter**.

You may want to create a similar note with some minor modifications. It is easy to do with PhatNotes. Select the note you want to create a copy of and choose the **Edit/Create Copy** menu item. It will create a copy of the selected note with the current creation and modification dates.

It is also possible to transfer the note to other applications such as Microsoft Word. To do so, select the note you want to copy to another application and choose the **Edit/Select All** menu item, then the **Edit/Copy** menu item. Run Word (or another application) and choose the **Edit/Paste** menu item. The note text will appear in the Word editor. You can use the **Edit/Paste Special** command to choose whether to paste with the formatting intact (RTF) or as plain text.

You can also use drag and drop to transfer and copy notes (using the Ctrl key) between PhatNotes and other applications.

To delete one or more unwanted notes from the database, select the note(s) you wish to delete and choose the **Edit/Delete** menu item. If you checked the **Permanently Delete Notes** box in the **Options** dialog box, PhatNotes will ask you to confirm the deletion. *This operation cannot be undone!*

PhatNotes has a very important feature which protects your notes from unauthorized access. When you protect a note with a password, PhatNotes will encrypt the note body with a 256-bit

encryption algorithm by using the password you've entered as an encryption key. The password itself will also be encrypted.

To protect and encrypt a note:

1. Open a notes and choose the **File/Protect** menu item. The **New Password** dialog box will appear (see figure 98).

Figure 98. New Password dialog box.

2. Enter the desired password into the **New Password** and in the **Confirm Password** fields.
3. Click **OK**.

> **Note:** Remember your password. If you forget the password, you won't be able to read the password-protected note(s) again.

View Statistics Information

With PhatNotes, you can view statistics information about the specific note, such as creation, modification, reminder date and time, number of words and characters, etc. To view the statistics information, choose the **View/Statistics** menu item.

Sorting and Filtering Notes

PhatNotes allows you to sort notes by creation and modification date, category, and subject in ascending or descending order. You can also change sort order and field, using the **Options** dialog box (see the *PhatNotes Settings* section, below). To sort data by any of these fields, simply click on the note list header. The sort field name is shown in the **Quick Find** edit box in the toolbar. An arrow will also appear in the header of the selected sort field. The arrow will point up if the sort is ascending, and point down if the sort is descending. For example, if notes are arranged by the creation date, the **Quick Find** edit box will display <Created>, and an arrow will appear in the Created header. To change a sort order, you can click on the current sort header or choose the **View/Sort Ascending** or the **View/Sort Descending** menu items. The current sort field and sort order will automatically be saved when you quit PhatNotes. When you start the program again it will use the same sort and filter options.

With PhatNotes you can filter notes using date range, text filter, and color filter.

To filter notes by the date range, specific text, color, or priority:

1. Choose the **Filter** item from the **Tools** menu. The **Filter** dialog box will appear (see figure 99).

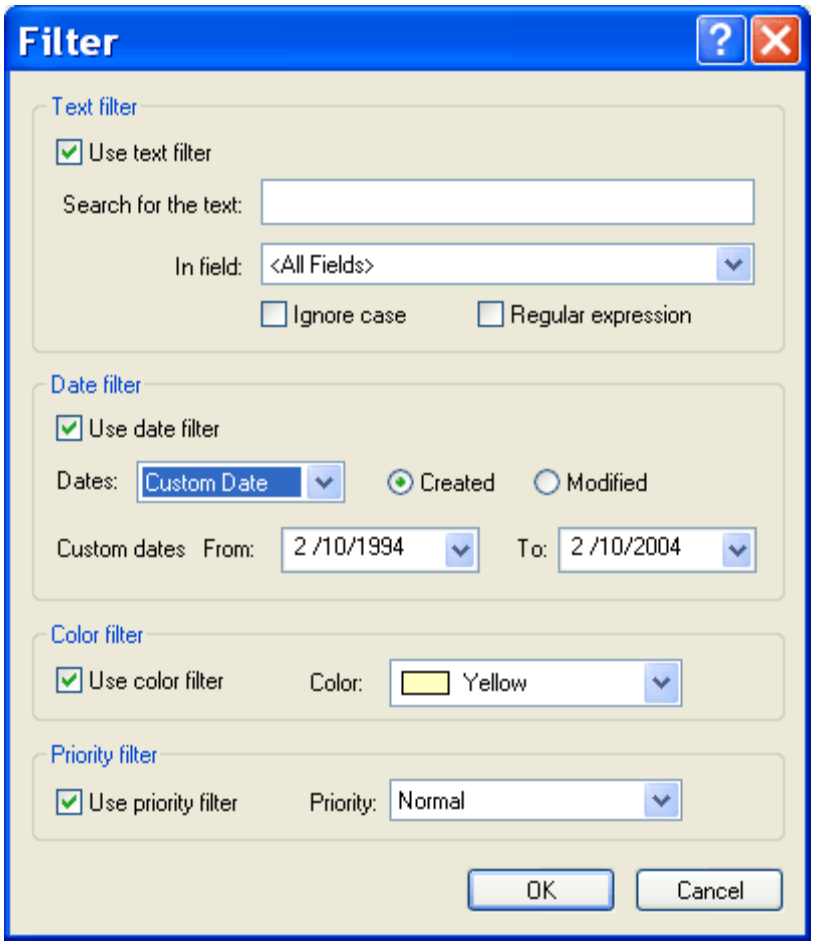

Figure 99. Filter dialog box.

2. Enter desired text into the **Search for the Text** box.
3. Select the field from the **In Field** list in which you wish to search for text.
4. For the case sensitive filter, uncheck the **Ignore Case** box.
5. If you want to use the regular expression search when filtering notes, check the **Regular Expression** box. For more information about the syntax of regular expressions, please see "*Appendix 4: Syntax of regular expressions*".
6. To apply the date filter, check the Use Date Filter box (see figure 99).
7. Select the desired date range in the **Dates** list. You can also enter custom dates. To edit the custom dates range, select **Custom Date** in the **Dates** list and enter the starting and ending dates in the **From** and **To** boxes. The dates must be entered in the **mm/dd/yy** (or **mm/dd/yyyy** if the regional settings are set to a 4-digit year) format, or click on the drop-down arrow and use the calendar to edit the date range. The starting date must be less or equal to the ending date. (See Appendix 5 -- PhatNotes Y2K Information, for more information.)
8. To apply the color filter, check the **Use Color Filter** box (see figure 99).
9. Choose the desired color from the **Colors** drop down menu.
10. To apply the priority filter, check the **Use Priority Filter** box (see figure 99).

11. Choose the desired priority (low, normal, or high) from the Priority drop down menu.
12. Click **OK**.

The filter settings will be saved when you exit PhatNotes and will be used again when you run the program.

Finding a Specific Note

You can find a note that contains the specific characters or words in the notes database using the *Find* command.

To find a note that contains a specific text in the current database:

1. Choose the **Find** item in the **Edit** menu or press **Ctrl+F** keys. The **Find Note** dialog box will appear (see figure 100).

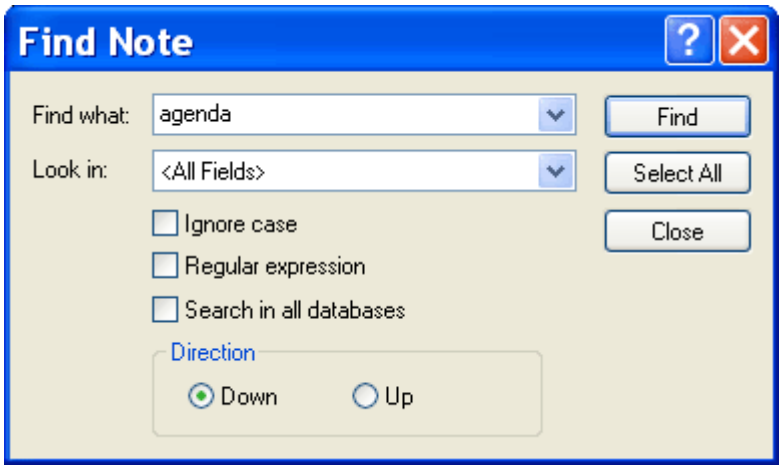

Figure 100. Find Note dialog box.

2. Enter the specific characters or word you wish to find in the Find What box.
3. Choose the field in which you want to find these characters or words in the **Look In** list. Choose <All Fields> to search in all database fields excluding password, creation, and modification dates.
4. For a case sensitive search, uncheck the **Ignore Case** box.
5. If you want to use the regular expression search, check the **Regular Expression** box. For more information about the syntax of regular expressions, please see "*Appendix 4: Syntax of regular expressions*".
6. Click **Find** to find the characters or word.
7. Click **Select All** to select all notes that contain this text.

PhatNotes will search for notes that contain the specified characters or words starting from the selected note. If the characters or words are found, that note or notes will be highlighted. To find the next note, choose the **Edit/Find Next** menu item or press **Ctrl+J** keys. If PhatNotes is unable to find a note, a warning message will be displayed.

To find all notes which contain a specific text in all databases:

1. Choose the **Find** item in the **Edit** menu or press **Ctrl+F** keys. The **Find Note** dialog box will appear (see figure 100).

2. Enter the specific characters or word you wish to find in the **Find What** box.
3. Choose the field in which you want to find these characters or words in the **In Field** list. Choose <All Fields> to search in all database fields excluding password, creation and modification dates.
4. Check the **Search In all databases** box.
5. For a case sensitive search, check the **Ignore Case** box.
6. Click **Find** to find the characters or word.
7. The **Found Records** dialog box will appear with a list of all found notes (see figure 101).
8. To go to the specific note, double click on the desired note in this list or click on **Go to Note**. If the selected note is in another database, PhatNotes will open the required database.

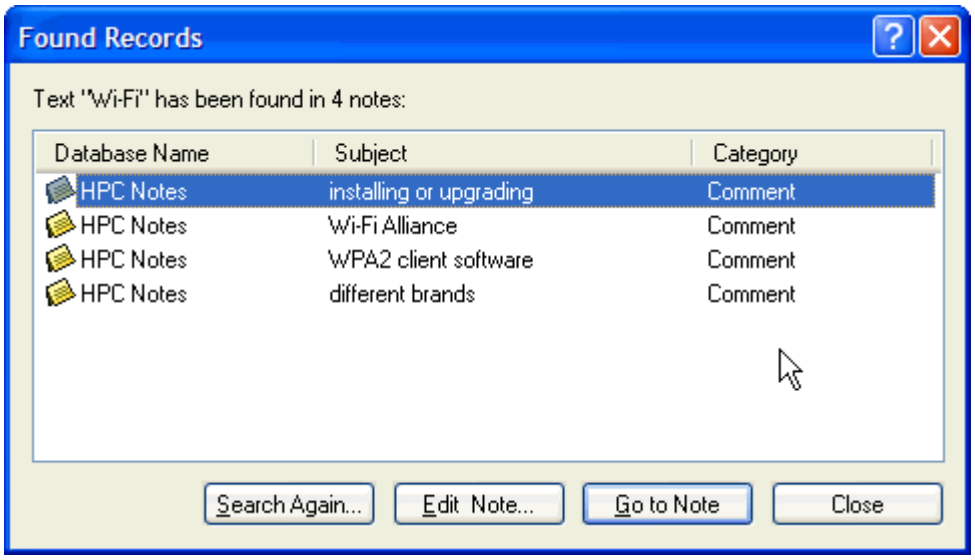

Figure 101. Found Records dialog box.

To use a Quick Search:

1. If you are looking for a specific note, you can also use the **Quick Find** feature by pressing the **Ctrl+Q** keys or by clicking on the **Quick Find** box in the toolbar.
2. Type a few characters of the information represented in the sorted column (the Quick Find box in the toolbar indicates which column is being searched).
3. The note list scrolls to the entry that matches the character(s) you typed.

For example, if the list is sorted by subject, category **gat**, and the list will scroll to "Gateway 2002 order".

Organizing Notes

PhatNotes allows a user to organize notes by the following categories:

Creation date

Modification date

Category

Color

Priority

To organize notes by the creation date, choose the **Tools/Organize Notes/By Creation Date** menu item.

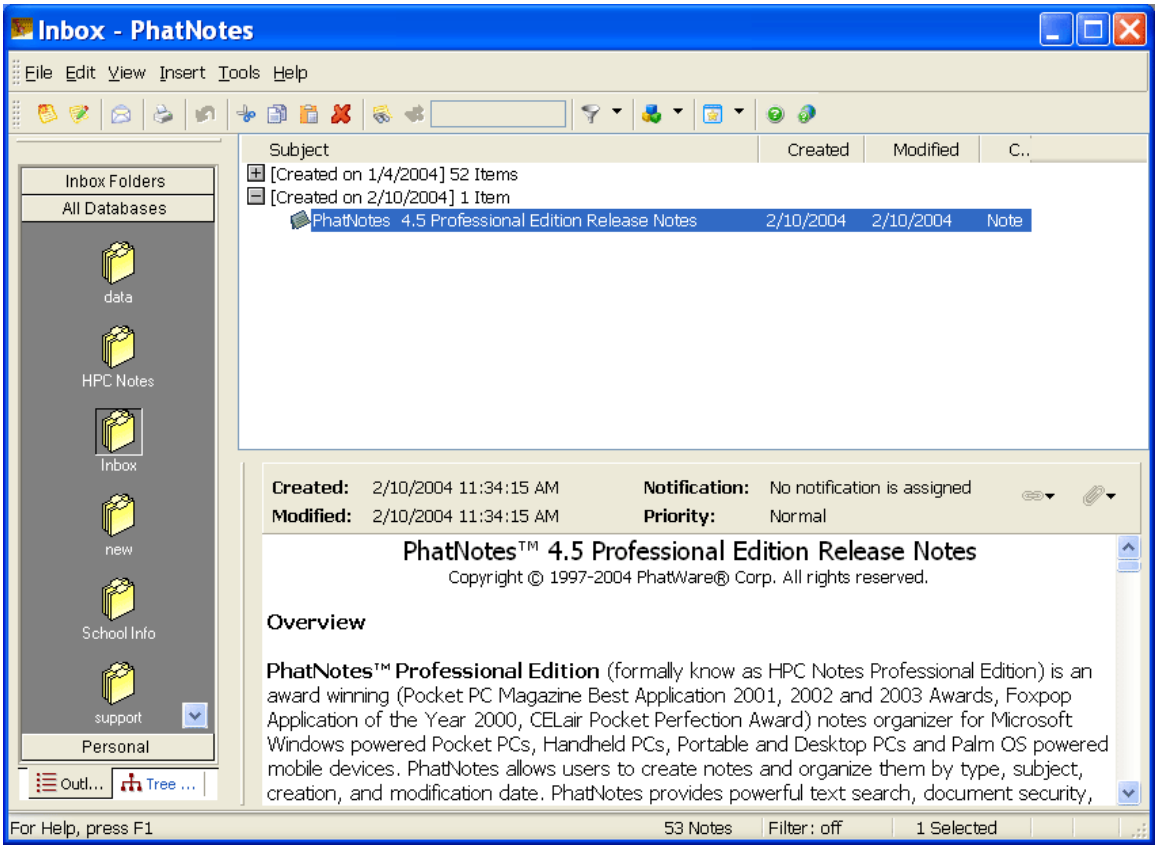
Inbox - PhatNotes
File Edit View Insert Tools Help
Inbox Folders
All Databases
data
HPC Notes
Inbox
new
School Info
support
Personal
Outl...
Tree ...
Subject
Created
Modified
C..
[Created on 1/4/2004] 52 Items
[Created on 2/10/2004] 1 Item
PhatNotes 4.5 Professional Edition Release Notes 2/10/2004 2/10/2004 Note
Created: 2/10/2004 11:34:15 AM
Modified: 2/10/2004 11:34:15 AM
Notification: No notification is assigned
Priority: Normal
PhatNotes™ 4.5 Professional Edition Release Notes
Copyright © 1997-2004 PhatWare® Corp. All rights reserved.
Overview
PhatNotes™ Professional Edition (formally know as HPC Notes Professional Edition) is an award winning (Pocket PC Magazine Best Application 2001, 2002 and 2003 Awards, Foxpop Application of the Year 2000, CELair Pocket Perfection Award) notes organizer for Microsoft Windows powered Pocket PCs, Handheld PCs, Portable and Desktop PCs and Palm OS powered mobile devices. PhatNotes allows users to create notes and organize them by type, subject, creation, and modification date. PhatNotes provides powerful text search, document security,
For Help, press F1
53 Notes
Filter: off
1 Selected

Figure 102. Organizes notes list.

The Notes list view will change, so notes will be grouped by the creation date (see figure 102). You can expand/collapse each group by clicking on the **[+]** button, or by double-clicking on the group header, or by pressing Enter key when the desired group title is selected. Each group title displays the category name and amount of notes in the group. Notes list view has a similar look when organized by modification date, category, or color.

- To organize notes by the modification date, choose the **Tools /Organize Notes/By Modification Date** menu item.
- To organize notes by the category, choose the **Tools /Organize Notes/By Category** menu item.
- To organize notes by the color, choose the **Tools /Organize Notes/By Color** menu item.
- To organize notes by the priority, choose the **Tools /Organize Notes/By Priority** menu item.
- To collapse all the notes groups, choose the **Tools /Organize Notes/Collapse All** menu item.
- To expand all the notes groups, choose the **Tools /Organize Notes/Expand All** menu item.

- To return to the regular notes view, choose the **Tools /Organize Notes/Disable** menu item.

While notes are organized by one of the categories listed above, you can still sort notes by any field and apply text, date, color, and/or priority filters.

Note Properties

You can also change the properties of the selected notes. Go to the **Edit** menu and tap on **Properties** (see figure 103).

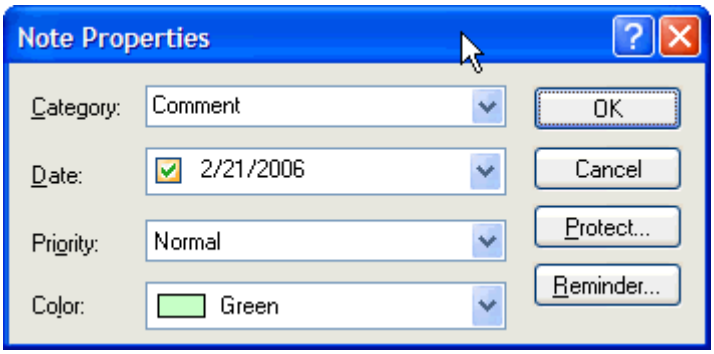

Figure 103. Note Properties dialog.

- Select the category to change from the **Category** drop down menu.
- Then select the properties you want to change, which includes the authoring date, priority, color, password, and reminder time.
- If multiple notes are selected, the Reminder button will not appear in this dialog box because it is not possible to assign the same reminder to multiple notes.
- If a single protected note is selected the **Protect** button is disabled. To change the password or unprotected the note you must open the note in the note editor first. If multiple notes are selected, the password will be changed (set) to the unprotected notes; password for notes that are already protected will not be changed. This has been done for the security reasons.

Working with the Note Editor

The note editor is used to create a new note or edit an existing note. To create a new note, simply click the **New Note** button in the main toolbar or click **New Note** from the Edit menu. To edit an existing note, double click on the desired note in the note list or select the desired note and press **Enter**. The note editor screen will be displayed (see figure 104).

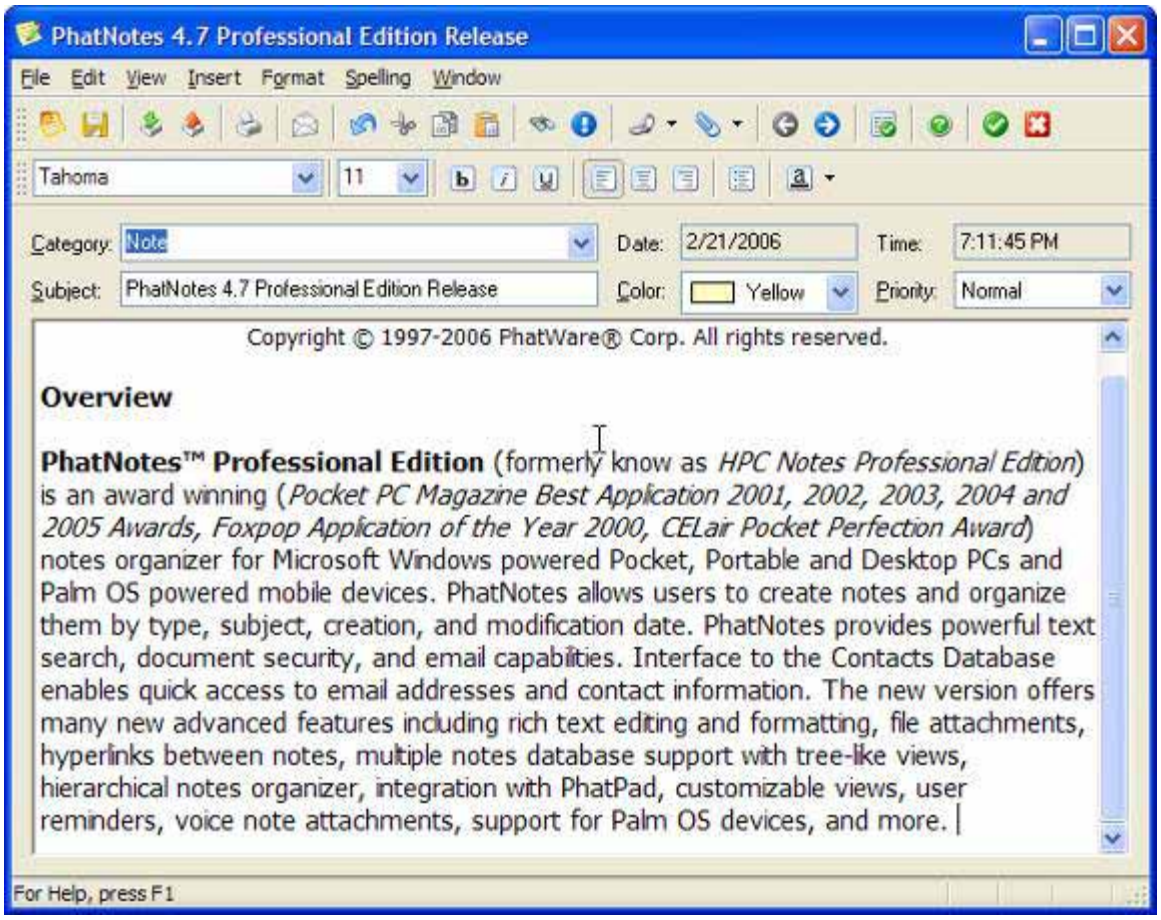
PhatNotes 4.7 Professional Edition Release
File Edit View Insert Format Spelling Window
Tahoma
11
Category: Note
Date: 2/21/2006
Time: 7:11:45 PM
Subject: PhatNotes 4.7 Professional Edition Release
Color: Yellow
Priority: Normal
Copyright © 1997-2006 PhatWare® Corp. All rights reserved.
Overview
PhatNotes™ Professional Edition (formerly know as HPC Notes Professional Edition) is an award winning (Pocket PC Magazine Best Application 2001, 2002, 2003, 2004 and 2005 Awards, Foxpop Application of the Year 2000, CELair Pocket Perfection Award) notes organizer for Microsoft Windows powered Pocket, Portable and Desktop PCs and Palm OS powered mobile devices. PhatNotes allows users to create notes and organize them by type, subject, creation, and modification date. PhatNotes provides powerful text search, document security, and email capabilities. Interface to the Contacts Database enables quick access to email addresses and contact information. The new version offers many new advanced features including rich text editing and formatting, file attachments, hyperlinks between notes, multiple notes database support with tree-like views, hierarchical notes organizer, integration with PhatPad, customizable views, user reminders, voice note attachments, support for Palm OS devices, and more.
For Help, press F1

Figure 104. Note editor screen.

When creating a new note, enter the note's category (or select category from the list) into the **Category** field, enter note's subject into the **Subject** field and enter text into the **Note Body** field. You must enter text into the note body or the subject fields; otherwise a new note cannot be created. If the subject field is empty, the first line of text (up to 128 characters) will be automatically copied into the subject field when a new note is created. If the note field is empty, the entire subject will be copied into the note field when a new note is created.

The note editor provides standard editor functionality such as Delete, Cut, Copy, and Paste text. It also supports drag and drop and basic text formatting features. These commands are applied to the note field only.

- To cut text so you can move it to another location, select the text, then on the **Edit** menu, choose **Cut** or click the **Cut** button in the toolbar.
- To copy text so you can paste a copy in another location, select the text, then on the **Edit** menu, choose **Copy** or click the **Copy** button in the toolbar. You can copy selected text by holding down the Ctrl key before dragging and dropping.
- To paste text you have cut or copied, place the insertion point where you want to paste the text, then on the **Edit** menu, choose **Paste** or click the **Paste** button in the toolbar.
- To enter a TAB character, press the TAB key.

- To change a note color, select the desired color from the **Edit/Color** menu or use the **Color** drop down menu next to the Subject box (see figure 104). The color of the note's icon will be changed accordingly.
- To change a note priority, select the desired priority from the **Edit/Priority** menu or use the **Priority** drop down menu next to the Color box (see figure 104). A priority can be **low**, **normal**, or **high**.

You can also undo the last editing operation by choosing the **Undo** item from the **Edit** menu or by clicking on the **Undo** button in the toolbar.

Finding and replacing text

With the note editor you can search for specific text. To find specific characters or words:

1. Choose the **Find** item from the **Edit** menu. The **Find** dialog box will appear (see figure 105).

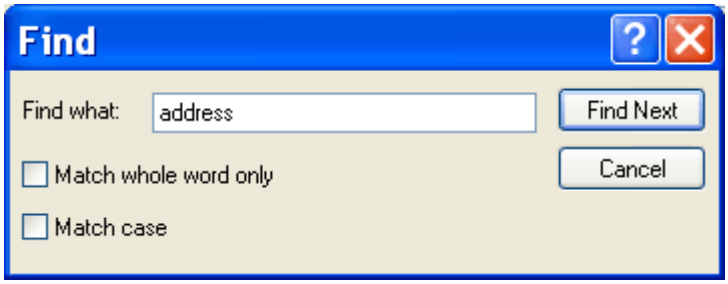

Figure 105. Find dialog box.

2. In the **Find What** box, type the characters or words you want to find. Check the **Match Case** box for a case sensitive search. Check the **Match whole word only** box to find only whole words, and not text that is inside longer words.
3. Click **Find Next**.

To replace specific characters or words with other characters or words:

1. Choose the **Replace** item from the **Edit** menu. The **Replace** dialog box will appear (see figure 106)

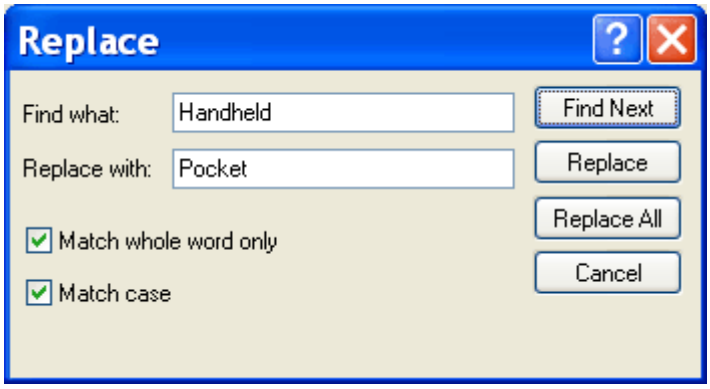

Figure 106. Replace dialog box.

2. In the **Find What** box, type the characters or words you want to find. Check the **Match Case** box for a case sensitive search. Check the **Match whole word only** box to find only whole words, and not text that is inside longer words.

3. In the **Replace with** box, type the characters or word you want to replace the found text with, or leave it blank to delete found characters or words.
4. Click **Find Next**.
5. When the specific text you're searching for is found it will be selected.
6. Click **Replace** to replace the text found, click **Find Next** to find the next occurrence of this text, or click **Replace All** to replace all occurrences of this text; otherwise click **Cancel** to close the dialog box.

Importing and exporting text files

The import and export functions can be used to transfer a note's text between PhatNotes and other applications. You can import (export) files in Plain Text, Unicode Text, and Rich Text formats.

To import a text file into the note box:

1. Choose the **Import** item from the **File** menu. The **Standard File Open** dialog box will appear.
2. Select the desired file name in the browse window.
3. Click **OK**.

WARNING All text in the note field will be replaced with the imported text. PhatNotes cannot import files larger than 32K.

To export the note as a text file:

1. Choose the **Export** item from the **File** menu. The Standard File **Save As** dialog box will appear.
2. Enter the desired file name into the name box.
3. Select the file category for the file you are saving.
4. Click **Save**.

Protecting Notes with a Password

With PhatNotes you can protect notes from unwanted access with a password. The protected note(s) are encrypted using the password as a protection key. The password itself is encrypted as well.

To protect notes with a password:

1. Choose the **File/Protect** menu item. The **New Password** dialog box will appear.
2. Enter the desired password into the **New Password** box.
3. Enter the same password into the **Confirm Password** box for confirmation.
4. Click **OK**.

To change a password:

1. Choose the **File/Unprotect Note** menu item.
2. Choose the **File/Protect** menu item. The **New Password** dialog box will appear.

3. Enter a new password into the **New Password** box.
4. Enter the same password into the **Confirm Password** box for confirmation.
5. Click **OK**.

Note: To unprotect the note or change the password, you must first open the protected note first.

Remember your password. If you forget the password you won't be able to read the password-protected note(s) again.

Sending email Messages from PhatNotes

The notes editor allows you to send email messages directly from PhatNotes. You can email a single note from the Note Editor. You also can send unlimited notes as attachments in a single email, using the **File/Send Mail** command in the Main Menu.

First, set up your e-mail options by running the E-Mail wizard using the main menu's **Tools/Email Options** item. You can send email using Microsoft Exchange Client (if you have Outlook 97 or later installed) or built-in SMTP client. You must have access to an SMTP server to be able to use PhatNotes SMTP client. You can also choose to send notes as an e-mail attachment. You can also use this Email Wizard to import or export a PhatNotes address book. If you don't want to use email capability, you may disable email support.

To send the note as an email message:

1. Choose the **Send Mail** item from the **File** menu. The **Send Mail** dialog will appear (see figure 107 and 108).

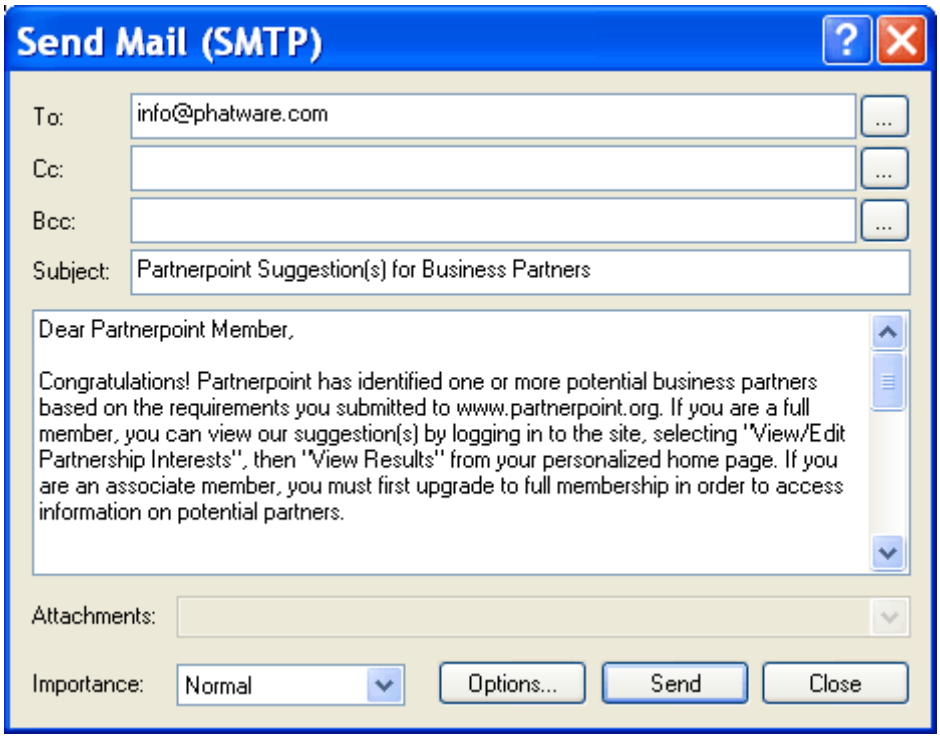
Send Mail (SMTP)
To:
info@phatware.com
Cc:
Bcc:
Subject:
Partnerpoint Suggestion(s) for Business Partners
Dear Partnerpoint Member,
Congratulations! Partnerpoint has identified one or more potential business partners based on the requirements you submitted to www.partnerpoint.org. If you are a full member, you can view our suggestion(s) by logging in to the site, selecting "View/Edit Partnership Interests", then "View Results" from your personalized home page. If you are an associate member, you must first upgrade to full membership in order to access information on potential partners.
Attachments:
Importance:
Normal
Options...
Send
Close

Figure 107. SMTP Send Mail dialog box.

Note: The attachment window will be grayed out if this option was **not** selected.

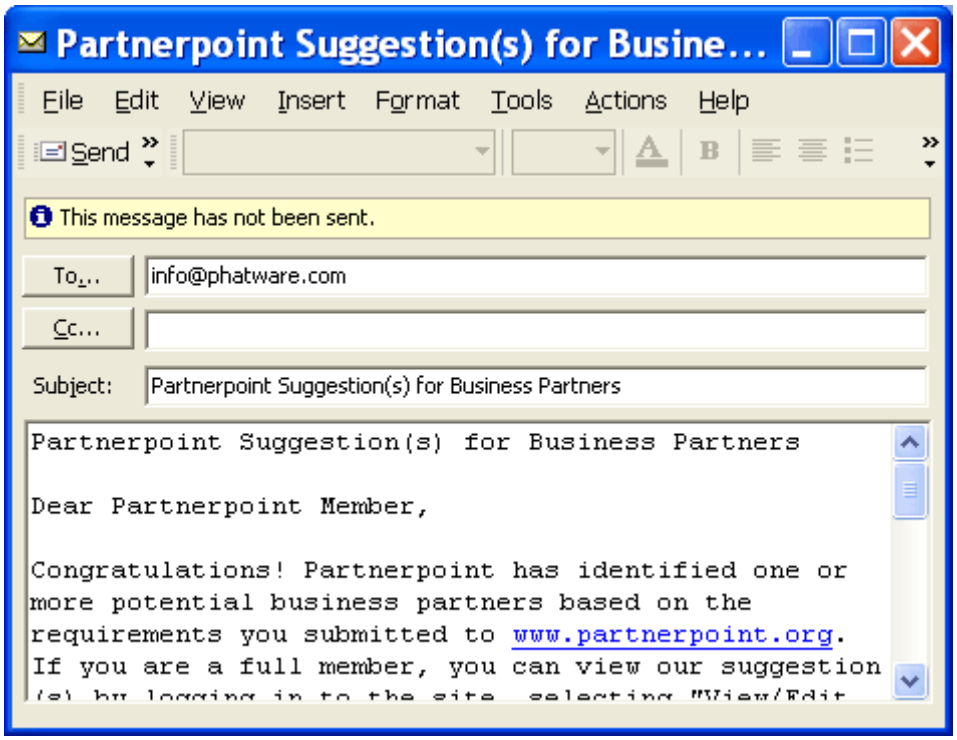
Partnerpoint Suggestion(s) for Busine...
File Edit View Insert Format Tools Actions Help
Send
This message has not been sent.
To...
info@phatware.com
Cc...
Subject:
Partnerpoint Suggestion(s) for Business Partners
Partnerpoint Suggestion(s) for Business Partners
Dear Partnerpoint Member,
Congratulations! Partnerpoint has identified one or more potential business partners based on the requirements you submitted to www.partnerpoint.org.
If you are a full member, you can view our suggestion

Figure 108. Outlook Send Mail dialog box.

You can send more than one note at a time as multiple attachments from the Main Screen. To do so, highlight the notes you want to send, and then choose the **File/Send Mail** menu item (see figure 109).

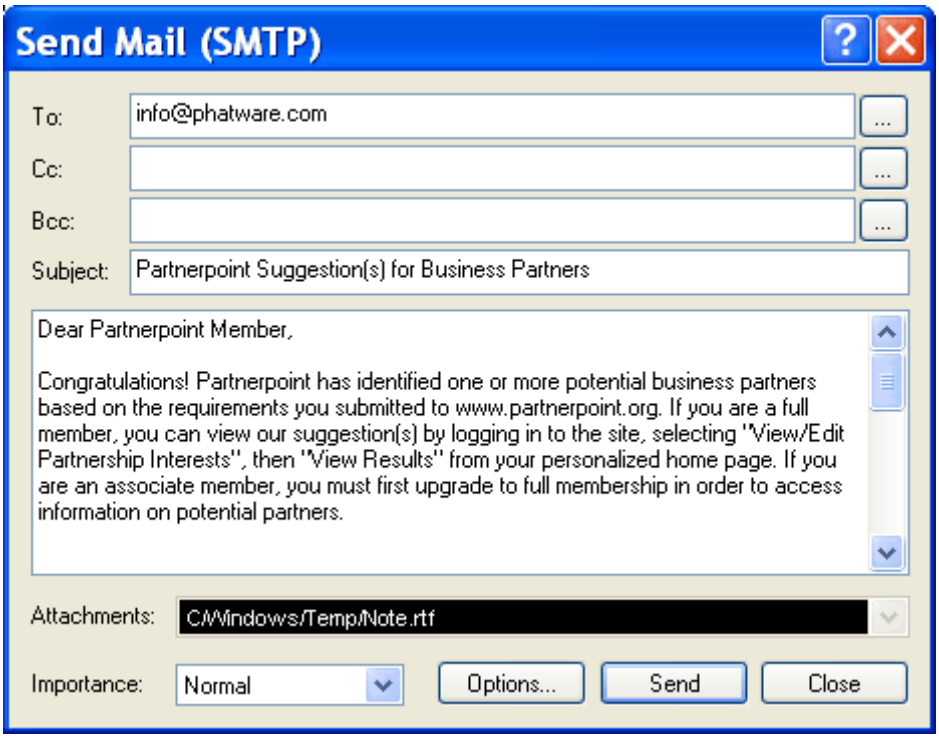
Send Mail (SMTP)
To:
info@phatware.com
Cc:
Bcc:
Subject:
Partnerpoint Suggestion(s) for Business Partners
Dear Partnerpoint Member,
Congratulations! Partnerpoint has identified one or more potential business partners based on the requirements you submitted to www.partnerpoint.org. If you are a full member, you can view our suggestion(s) by logging in to the site, selecting "View/Edit Partnership Interests", then "View Results" from your personalized home page. If you are an associate member, you must first upgrade to full membership in order to access information on potential partners.
Attachments:
C:\Windows\Temp\Note.rtf
Importance:
Normal
Options...
Send
Close

Figure 109. SMTP Send Mail dialog box (with attachments).

2. Enter the desired email address into the **To** box. PhatNotes provides a quick access to email addresses stored in the contacts database. Click the ... or To... button to view the list of names and email addresses stored in the contacts database. The **Email Addresses** dialog box will appear (see figure 110).

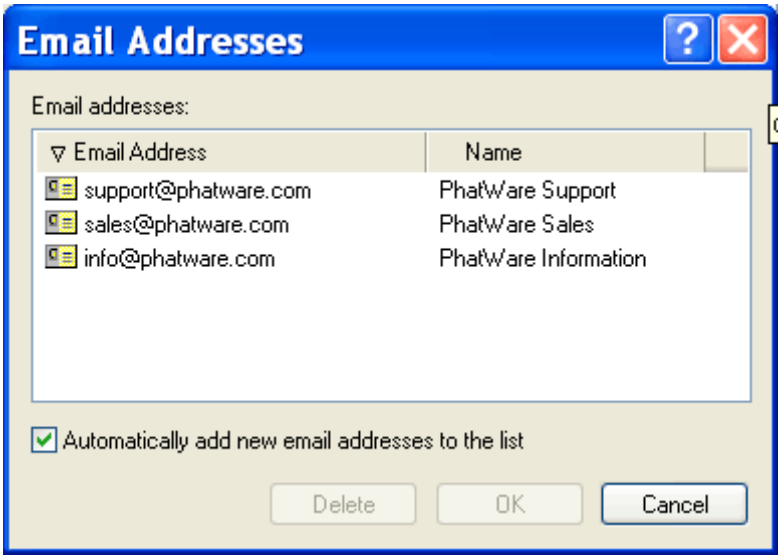

Figure 110. Choose Address dialog box.

3. Select the desired email address from the list and click **OK**. The email address will appear in the **To** box
4. If you want to CC and BCC the same message, enter email addresses into **CC** and **BCC** boxes.
5. Click **Send**.

Note: The Rich Text option will have no effect if notes are stored in the database as plain text. See "PhatNotes Settings" section for more information.

The email message will be sent immediately.

Inserting Current Date and Time

To insert the current date and time into the body text, choose the **Date & Time** item from the **Insert** menu. From here you can choose from six different formats (for examples, see the Inserting *Current Date and Time* item from the **Pocket PC Features** section, above).

NOTE: Your results may vary slightly from the examples, depending on your regional settings. To change the date and time format, use the **Regional Settings Properties** dialog box in the **Windows Control Panel**.

Inserting Reminders

To insert a user reminder:

1. Choose the **Reminder** item from the **Insert** menu. The **Reminder** dialog box will appear (see figure 111)

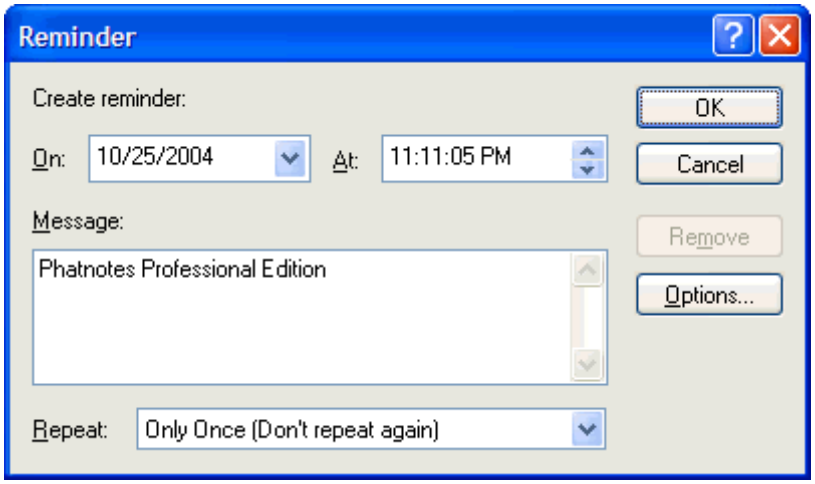

Figure 111. Reminder dialog box.

2. Enter the desired date and time into **On** and **At** fields. The default reminder time and date can be changed using the Options dialog box. See the "New Note Settings" section for more information.
3. Select when to repeat the reminder from the drop-down menu.
4. Enter reminder text into the **Message** field. The note's subject appears in this field automatically.
5. Click the **Options** button to modify reminder options, such as type of sound, message, and flashing icon, and when to run the reminder utility. (See the *PhatNotes Reminder Utility* section below for more information.)
6. Click **OK**.

A note that contains a reminder will be marked with a *bell* icon in the Main Screen until the reminder goes off.

Once it goes off, the PhatNotes Reminder Dialog may appear (see the "Once Reminder Occurs" section).

To remove the reminder, click the **Remove** button in the **Reminder** dialog box.

Note: Only one reminder can be associated per note.

Spell Checker Interface

To check spelling:

1. Choose the **Check Spelling** item from the **Spelling** menu in the Note Editor or click the **Check Spelling** button on the toolbar. If no spelling errors are found "The spell check is complete" message will be displayed. When spell checker finds a possible error, the **Check Word** window or dialog box will appear (depending on your chosen option).

2. Select the correct word from the suggestion list (if any) and click **Replace** or **Replace All** to correct the error. You also can type in the replacement if no appropriate suggestions are found.
3. Click **Ignore** or **Ignore All** to ignore the possible error.
4. Click **Add** to add a new word to the user-defined dictionary.
5. Click **Suggest** to update the suggestion list.

Note: If you get a message similar to figure 112, use the spell checker options dialog box to point to the location of the dictionary (see below).

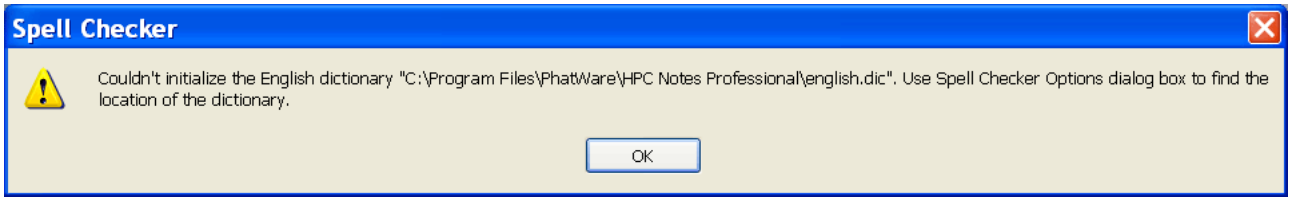
Spell Checker
Couldn't initialize the English dictionary "C:\Program Files\PhatWare\HPC Notes Professional\english.dic". Use Spell Checker Options dialog box to find the location of the dictionary.
OK

Figure 112. Spell Checker Warning message box.

To change spell checker options:

1. Choose the **Options** item from the **Spelling** menu. The **Options** dialog box will appear (see figure 113).

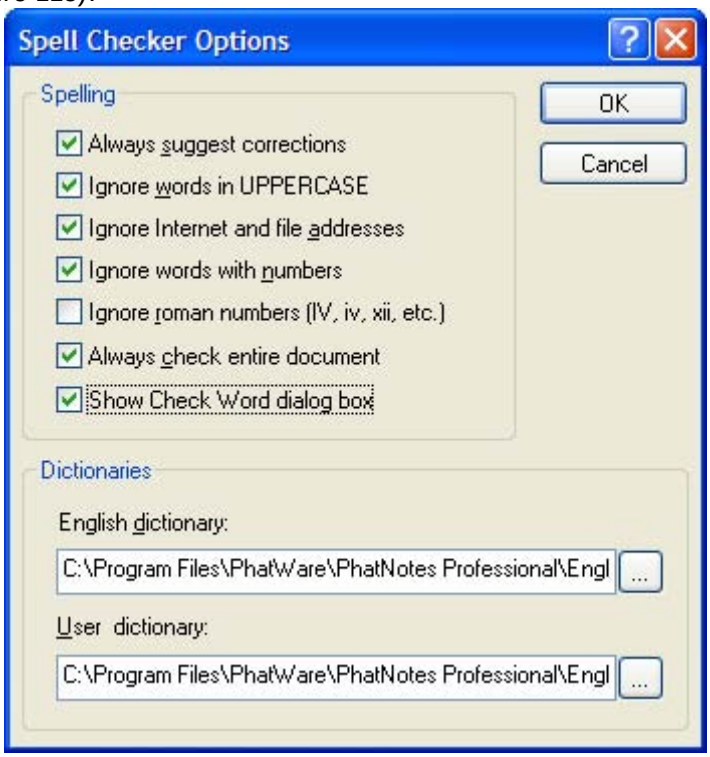

Figure 113. Spell Checker Options dialog box.

2. Check the **Always suggest corrections** box to automatically update a suggestion list in the Check Word dialog box.
3. Check the **Ignore words in UPPERCASE** box to ignore words in uppercase during a spelling check.

4. Check the **Ignore Internet and file addresses** box to automatically ignore Internet addresses, file names and electronic mail addresses during a spelling check. For example, check this box to ignore internet and email addresses such as http://www.phatware.com during a spelling check.
5. Check the **Ignore words with number** box to ignore words that contain numbers during a spelling check.
6. Check the **Ignore roman numbers** box to ignore Roman number such as ii, iv, xii, IV, XIV, etc.
7. Check the **Always check entire document** box if you want to spell check the entire note, regardless of where the spell check was started. If unchecked, and the cursor was not at the beginning of the note, once the spellchecker reaches the end of the document, a dialog will appear asking if you want to continue the spell check from the beginning of the document.
8. Check the **Show Check Word dialog box** to show a dialog box of suggested words instead of a pop-up menu.
9. You can also modify the location of the main English and User dictionaries by editing the file names in the **English dictionary** and **User dictionary** boxes. To browse the location of another dictionary, click on the button next to the appropriate dictionary.
10. Click **OK** when finished editing the spell checker options.

Formatting Text

To change a font type, style, or size:

1. Select the text whose format you want to change.
2. Choose the **Font** item from the **Format** menu or use the **Alt+T** keyboard shortcut. The **Font** dialog box will appear (see figure 114).

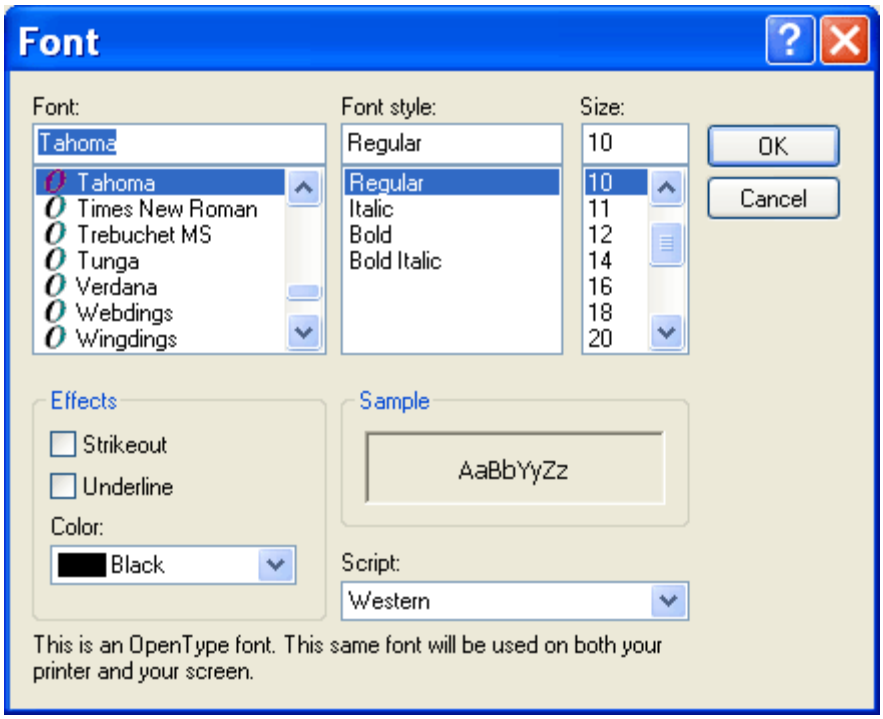

Figure 114. Font dialog box.

3. Select the font you like from the **Font** list or enter the font name into the font box.
4. Select the font size you like from the **Size** list.
5. Choose the font style by selecting the font from the **Font Style** list and checking the **Strikeout** and/or **Underline** boxes.
6. Choose the desired color from the **Color** drop-down menu.
7. Click **OK**

You can specify the font for new text by changing the font settings before you begin to type.

You can also change the settings described above (with the exception of Strikeout) directly from the Notes Editor Format Bar (see figure 115).

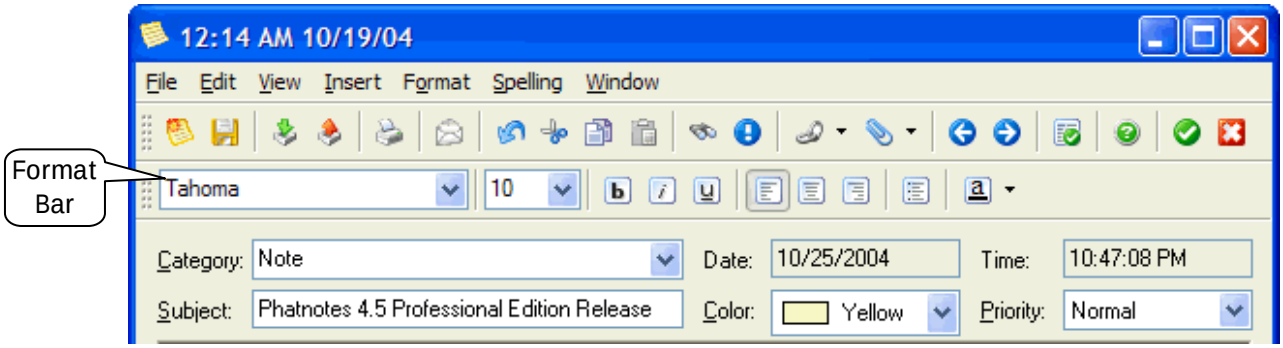

Figure 115. Format Bar.

You can change the font for an entire document by clicking the **Edit** menu and then clicking **Select All** before clicking **Font** from the **Format** menu.

To format a paragraph:

1. Click anywhere in the paragraph you want to format.
2. Choose the **Paragraph** item from the **Format** menu or use the **Alt+P** keyboard shortcut. The **Paragraph** dialog box will appear (see figure 116).

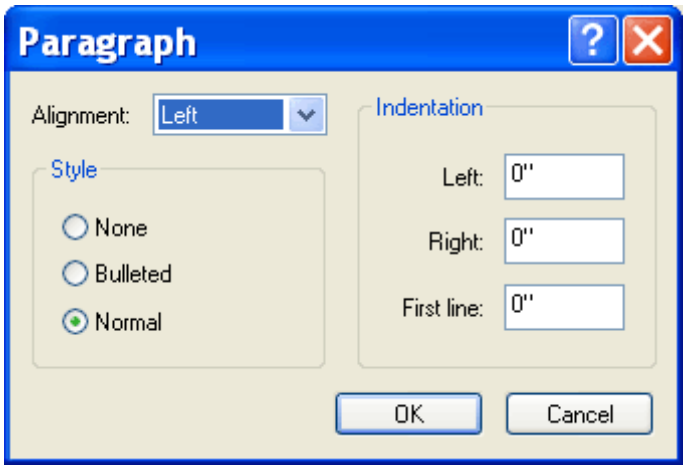

Figure 116. Paragraph dialog box.

3. Enter the indentation (in inches) and alignment options you want.
4. Choose the paragraph's style in the **Style** group.
5. Click **OK**.

You can define paragraph formatting for a new document by changing the format options before you begin to type.

To set or remove tab stops in paragraphs:

1. Select the paragraphs in which you want to set tab stops.
2. Choose the **Tabs** item from the **Format** menu or use the **Ctrl+T** keyboard shortcut. The **Tabs** dialog box will appear (see figure 117).

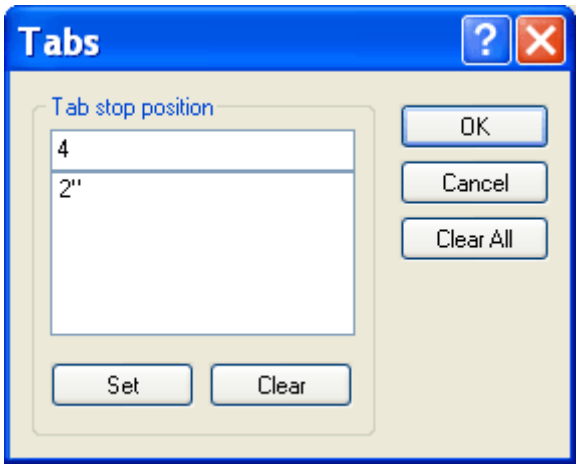

Figure 117. Tabs dialog box.

3. To set a tab stop, type the measurement (in inches) for a new tab stop in the **Tab Stop Position** window, and then click **Set**.
4. To delete a tab stop, click it in the list, and then click **Clear**.

5. To delete all tab stops in the selected paragraph, click **Clear All**.
6. Click **OK**.

Window Manager

PhatNotes Window Manager allows quick switching between multiple Note Editor windows and arranging them as overlapping titles. The **Window** menu in the Note Editor window contains the following items:

Close	Closes the current Note Editor window. The same as the **File/Cancel** menu command.
Close All	Closes all currently opened Note Editor windows. If one or more notes were modified, you will be prompted to save or ignore the changes.
Next	Activates the next Note Editor window. If the window is minimized it will be restored to its original size.
Previous	Activates the previous Note Editor window. If the window is minimized it will be restored to its original size.
Cascade	Arranges the Note Editor windows as overlapped titles.

Printing

With PhatNotes you can print one or more selected notes from the note list, or a single note from the note editor.

1. Select one or more notes you wish to print (if in the note list) and choose the **Print** item from the **File** menu or click on the **Print** button. The **Print** dialog box will appear (see figure 118).

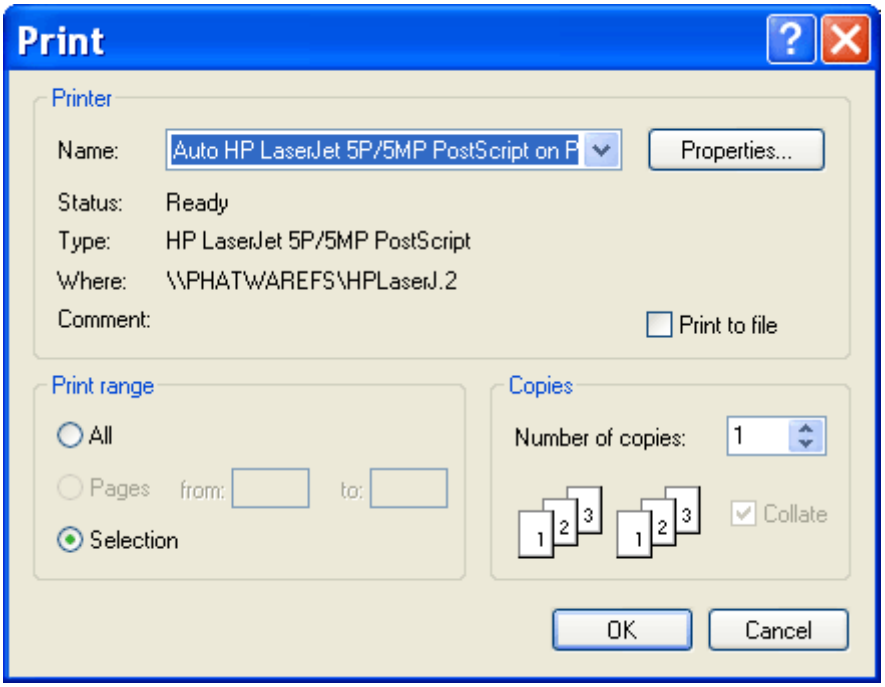

Figure 118. Print dialog box.

2. Select the printer settings as normal.
3. Click **OK**.

While printing, the **Abort Printing** dialog box will be displayed. If you want to cancel before printing is finished, click **Cancel** or press the **Escape** key. It could take a few seconds to abort printing.

Note: Password-protected notes will not print from the main menu for security reasons. To print password-protected notes, use the print command inside the note editor.

Attachments and Notes Linking

PhatNotes allows a user to attach a shortcut to any file and to other notes.

Inserting attachments

To attach a file to a note:

1. Highlight a note from the note list or open the note.
2. Click on the Attach Files icon in the preview pane on the Main Screen or on the Note Editor toolbar, or select **Files -> Attach** from the **Insert** menu. (see figure 119).

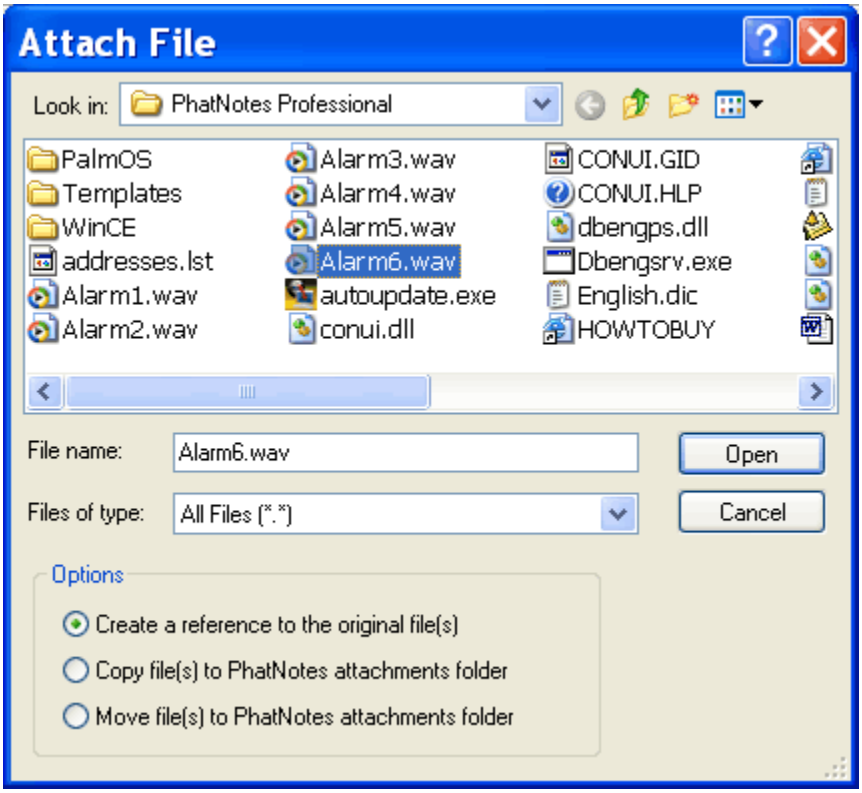

Figure 119. Open dialog box.

3. Select the file you want the note to link to. You are also able to link multiple files at once using the Ctrl or Shift key while selecting.
4. Select from one of the three options at the bottom of the screen.

- **Create a refererence to the original file(s)** creates a link to the files, without moving or effecting the original files in any way.
- **Copy** or **Move file(s) to PhatNotes attachments folder** copies or moves the files to the *My Documents/PhatNotes Files* folder.

5. In the Note Editor Screen, the attached files will appear in the bottom pane (see figure 120).

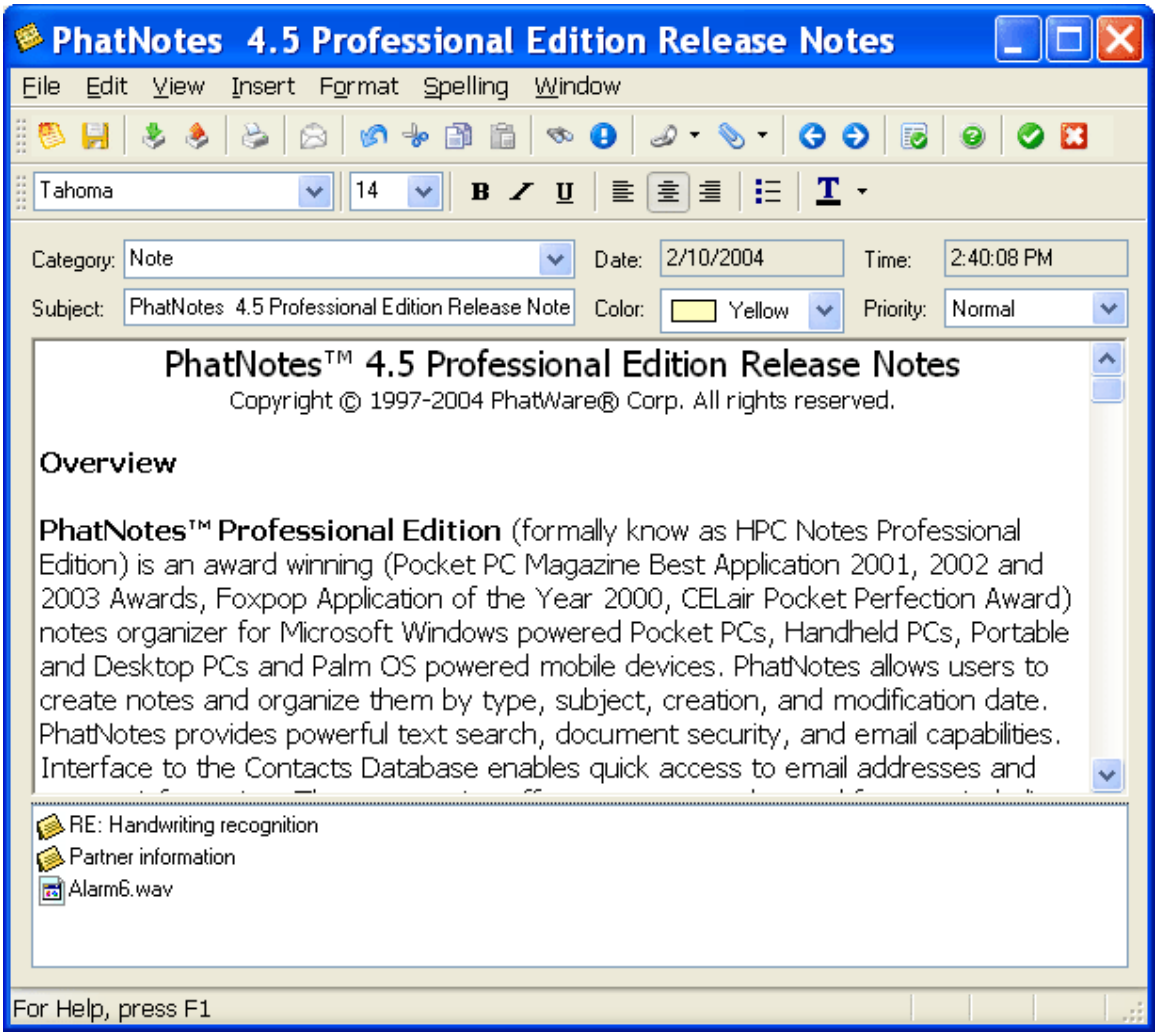
PhatNotes 4.5 Professional Edition Release Notes
File Edit View Insert Format Spelling Window
Tahoma
14
Category: Note
Date: 2/10/2004
Time: 2:40:08 PM
Subject: PhatNotes 4.5 Professional Edition Release Note
Color: Yellow
Priority: Normal
PhatNotes™ 4.5 Professional Edition Release Notes
Copyright © 1997-2004 PhatWare® Corp. All rights reserved.
Overview
PhatNotes™ Professional Edition (formally know as HPC Notes Professional Edition) is an award winning (Pocket PC Magazine Best Application 2001, 2002 and 2003 Awards, Foxpop Application of the Year 2000, CELair Pocket Perfection Award) notes organizer for Microsoft Windows powered Pocket PCs, Handheld PCs, Portable and Desktop PCs and Palm OS powered mobile devices. PhatNotes allows users to create notes and organize them by type, subject, creation, and modification date. PhatNotes provides powerful text search, document security, and email capabilities. Interface to the Contacts Database enables quick access to email addresses and
RE: Handwriting recognition
Partner information
Alarm6.wav
For Help, press F1

Figure 120. Attached files.

6. To open an attached file, click on the arrow next to the Attach Files icon in the Note Preview pane or select **Files** from the **Insert** menu. The list of linked files will appear.
7. Click on the file you want to open. The file will open in its associated application.
8. To Detach an attached file, click on the arrow next to the Attach Files icon or select **Files -> Detach** from the **Insert** menu. The list of linked files will appear in the *Detach File* window (see figure 121).

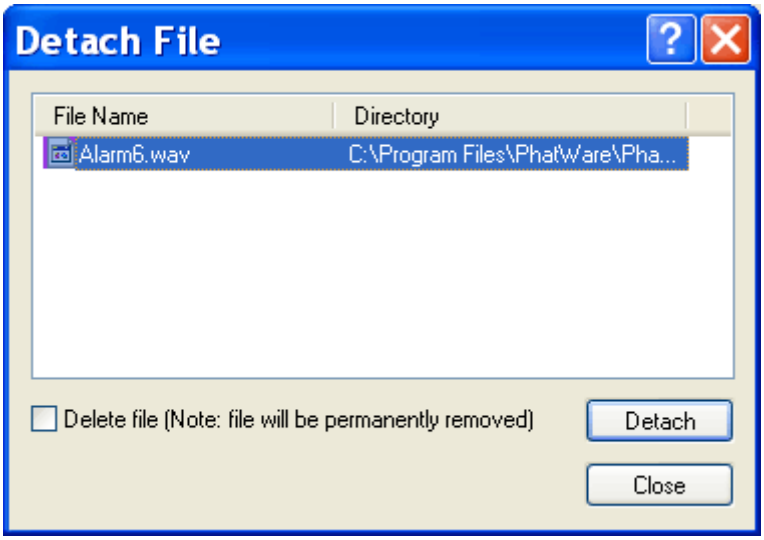

Figure 121. Detach File Window.

9. Click on the file you want to detach. You can also permanently delete the selected files.
10. Alternately, you can attach additional files or detach files by right-clicking on an attached file in the bottom pane of the Note Editor window.

Linking to other notes

To insert a link to another note:

1. Highlight a note from the note list or open the note.
2. Click on the Create Link icon in the preview pane on the Main Screen or on the Note Editor toolbar or select **Links -> Create** from the **Insert** menu. (see figure 122).
3. The *Link Notes* window appears. From the Notes List, select the note you want the note to link to. You are also able to link multiple notes at once using the Ctrl or Shift key while selecting. Click on the **Link** button in the *Link Notes* window.

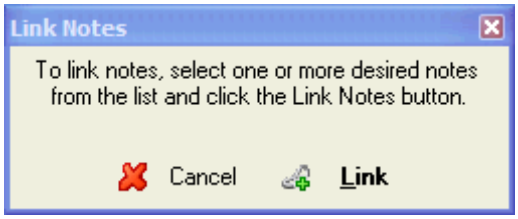

Figure 122. Link Notes Window.

4. In the Note Editor Screen, the linked notes will appear in the bottom pane.
5. To go to a linked note, click on the arrow next to the Create Link icon or select **Links** from the **Insert** menu. The list of linked notes will appear.
6. Click on the note you want to go to. If in the note editor, the linked note will appear in the Note Editor window. If in the Main Window, the linked note will be highlighted in the Notes List and Note Preview panes.

7. To Edit a linked note, click on the arrow next to the Create Link icon or select **Links -> Edit** from the **Insert** menu. A hierarchical list of linked notes will appear in the *Links*.
8. From this window, you can:
   - Select a linked note and view all its links using the **View Links** button (if this window was open from the Main Screen).
   - View the selected note in the *Note Preview* pane using the **View Note** button (if this window was open from the Main Screen).
   - Create another link using the **Create Link** button
   - Open the selected note in the *Note Editor* window using the **Edit Note** button.
   - Detach the selected link using the **Delete Link** button.
9. Alternately, you can link additional notes or edit linked notes by right-clicking on a linked note in the bottom pane of the Note Editor window.

Importing and Exporting Notes

PhatNotes allows importing and exporting the entire notes database or selected notes from the notes list as a text file. Tab Separated Values (TXT) and Comma Separated Values (CSV) formats are currently supported. Using the **File -> Import & Export** menu command wizard from the Main Menu, it is possible to transfer data between PhatNotes and other applications.

To import notes from a file using TXT and CSV formats:

1. From the Wizard, choose either the Import from Tab Separated Values File (TXT) or Import from Comma Separated Values File (CSV) format, and click **Next** (see figure 123).

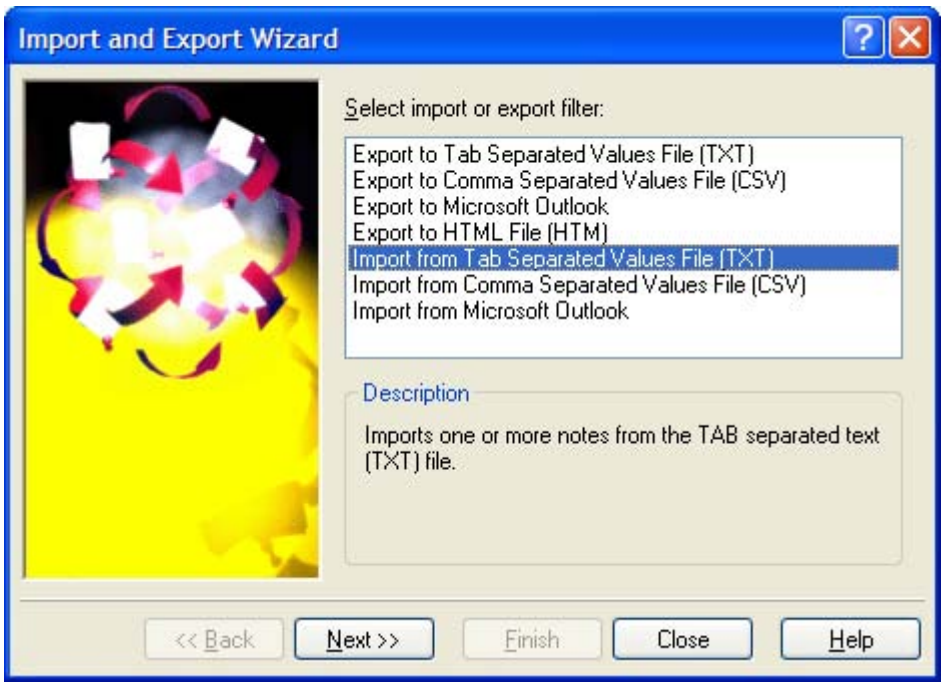
Import and Export Wizard
Select import or export filter:
Export to Tab Separated Values File (TXT)
Export to Comma Separated Values File (CSV)
Export to Microsoft Outlook
Export to HTML File (HTM)
Import from Tab Separated Values File (TXT)
Import from Comma Separated Values File (CSV)
Import from Microsoft Outlook
Description
Imports one or more notes from the TAB separated text (TXT) file.
<< Back
Next >>
Finish
Close
Help

Figure 123. Import and Export Wizard dialog box.

2. The **Import From File** dialog box will appear. Type or select the desired file name and click **Next**.

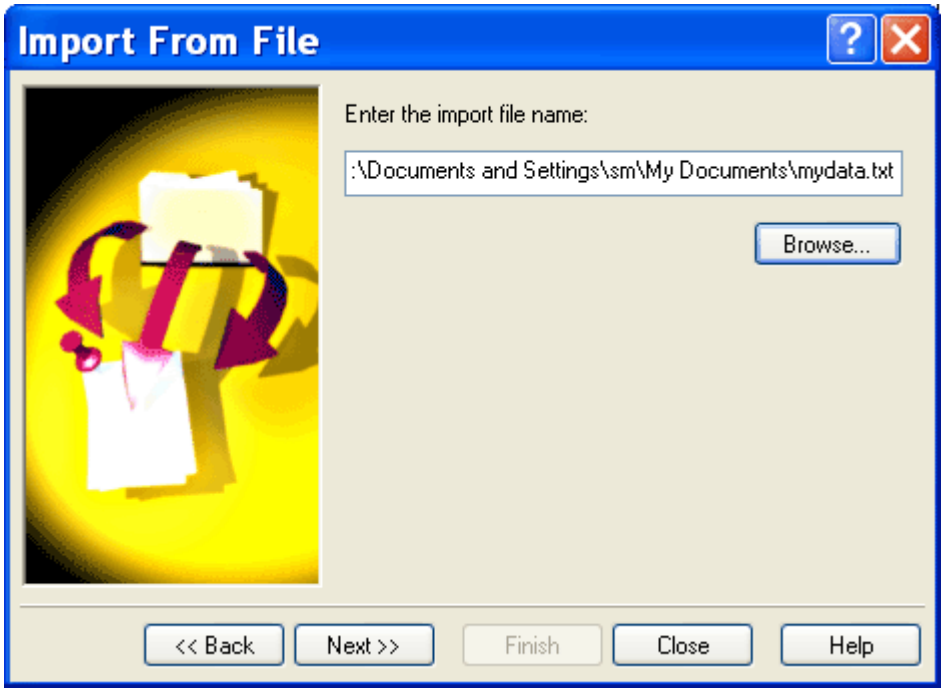

Figure 124. Import From File dialog box.

3. In the next window you can also change the following import options:

   - Select **Allow duplicate items to be created** box to create duplicate items, even if a matching record already exists.
   - Select **Replace duplicate items with imported** box to replace duplicate items.
   - Select **Do not import duplicate items** box to leave the duplicate items in the notes database untouched. This will not allow the import of the current note.

     Note: When checking for duplicate items, PhatNotes uses the Note Body field only.

   - Select the **Date format** which will be used to decode the text date when importing data from the text file. If the Autodetect option is selected (default), PhatNotes will try to decode the date by trying different date formats in the order they appear in this drop-down menu.
   - Check **Skip first (header) record** to skip the very first record in the imported file. This record usually contains field names.

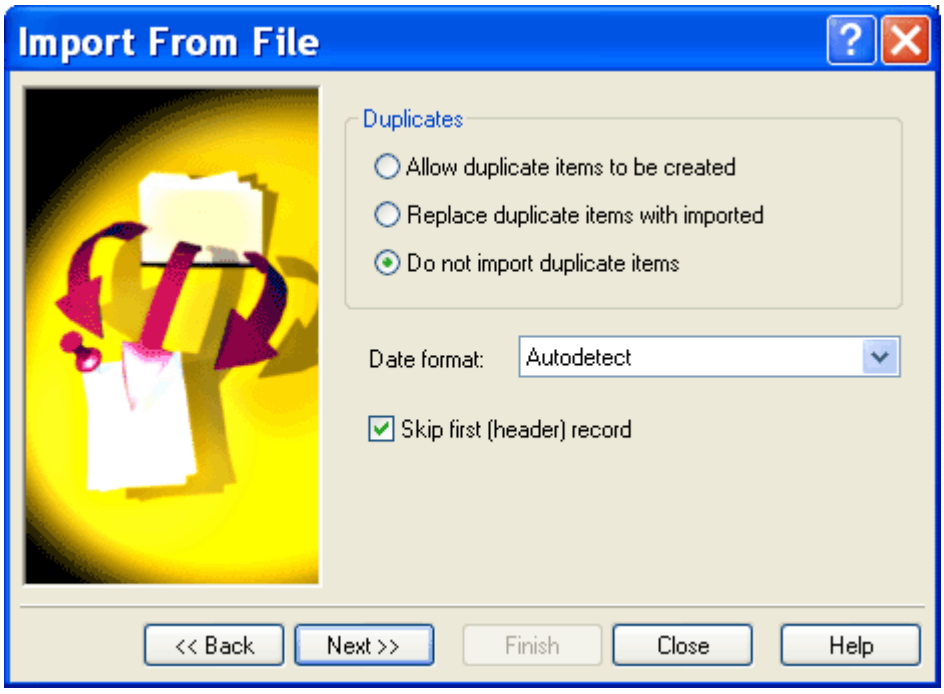

Figure 125. Import Options dialog box.

Click **Next**.

4. The Automatic field mapping pane shows how each field in a file will be mapped to in PhatNotes.

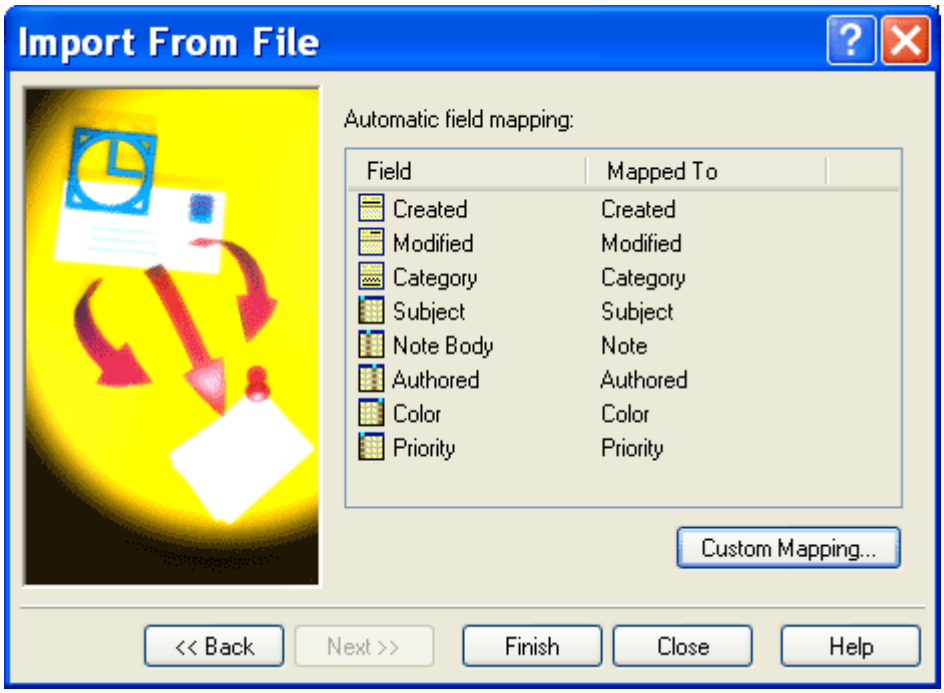

Figure 126. Import Filed Mapping dialog box.

Click on **Custom mapping** to change these mappings.

To map fields:

1. Click **Clear map** to clear the current map list.

2. Click **Default map** to create a default map list, if possible.

-or -

3. Select a field name in the **File fields** list and a field name in the **Notes fields** list and click **Map fields**. The File Field selected will now show under the **Mapped to** heading.

4. When done with your selections, click **OK**.

5. Click on **Finish** to Import the selected file.

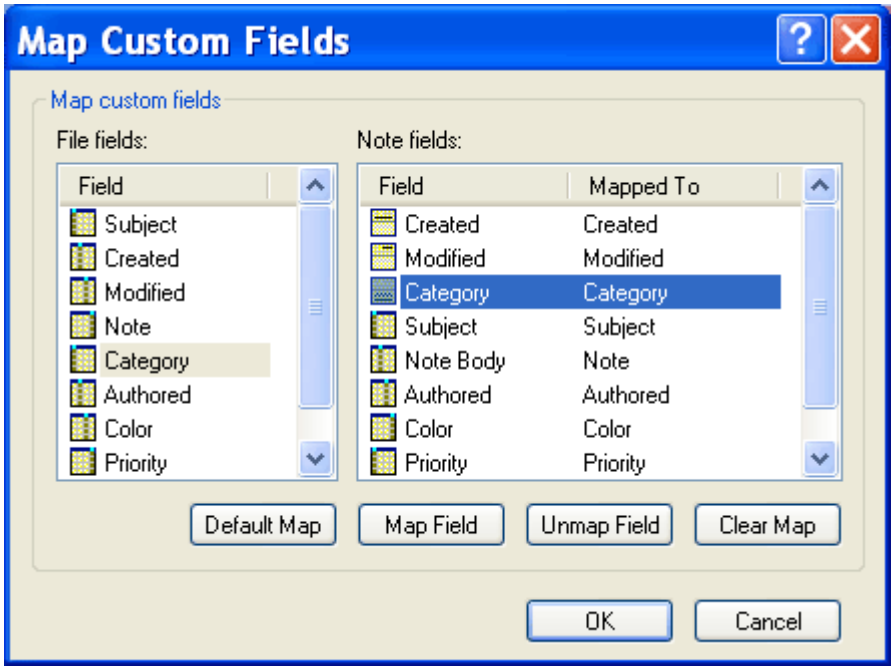

Figure 127. Map Custom Files dialog box.

To import notes from a Microsoft Outlook file:

1. From the Wizard, choose Import from Microsoft Outlook, and click **Next** (see figure 128).

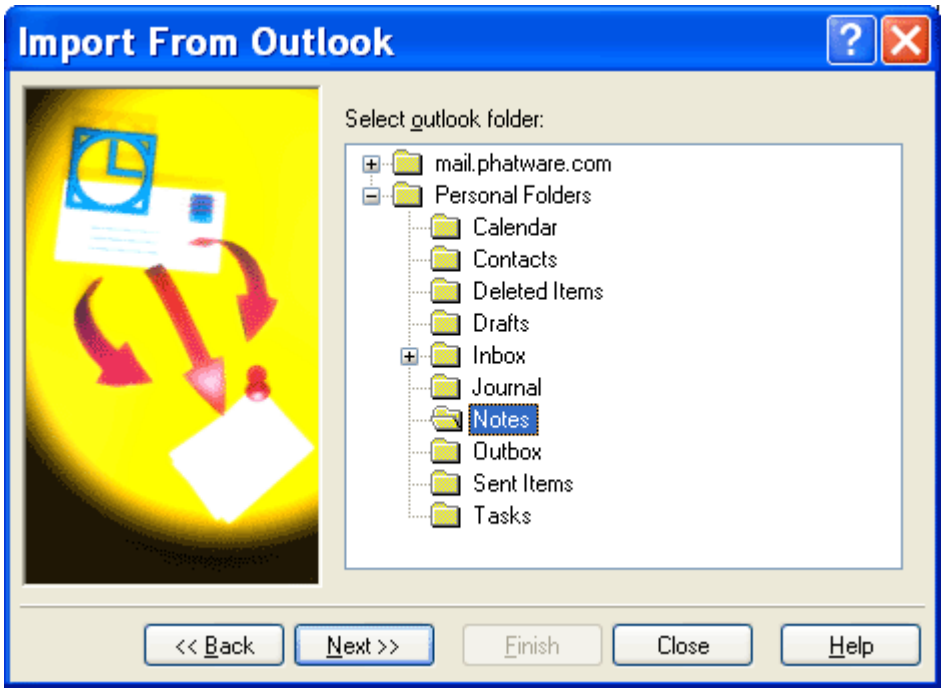

Figure 128. Import From Outlook dialog box.

2. Select the folder you want to import into PhatNotes. Click **Next**.

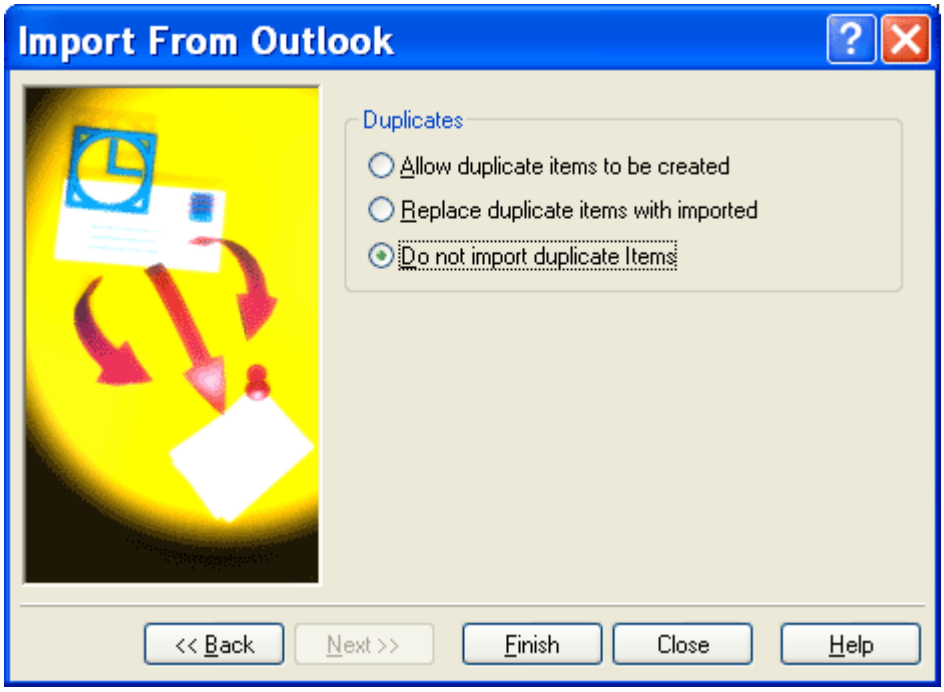

Figure 129. Import From Outlook dialog box.

3. Select how you want to deal with duplicate items. Click **Finish**. The items will now appear in PhatNotes.

To export notes into a file using TXT and CSV formats:

1. From the Wizard, choose either the Export from Tab Separated Values File (TXT) or Export to Comma Separated Values File (CSV) format, and click **Next** (see figure 130).

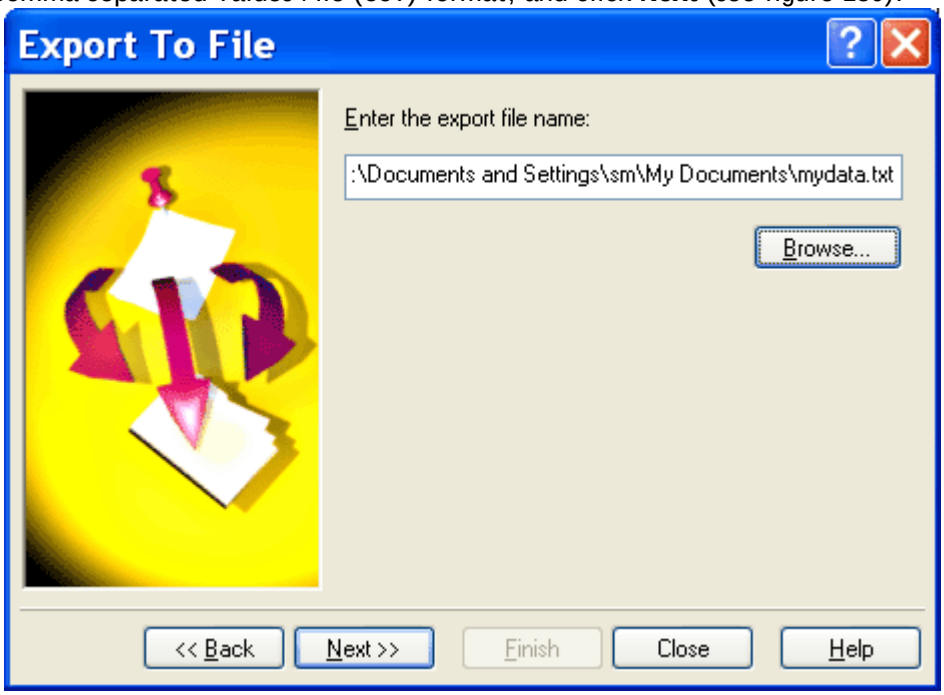

Figure 130. Export To File dialog box.

2. The **Export to File** dialog box will appear. Type or select the desired file name and click **Next**.

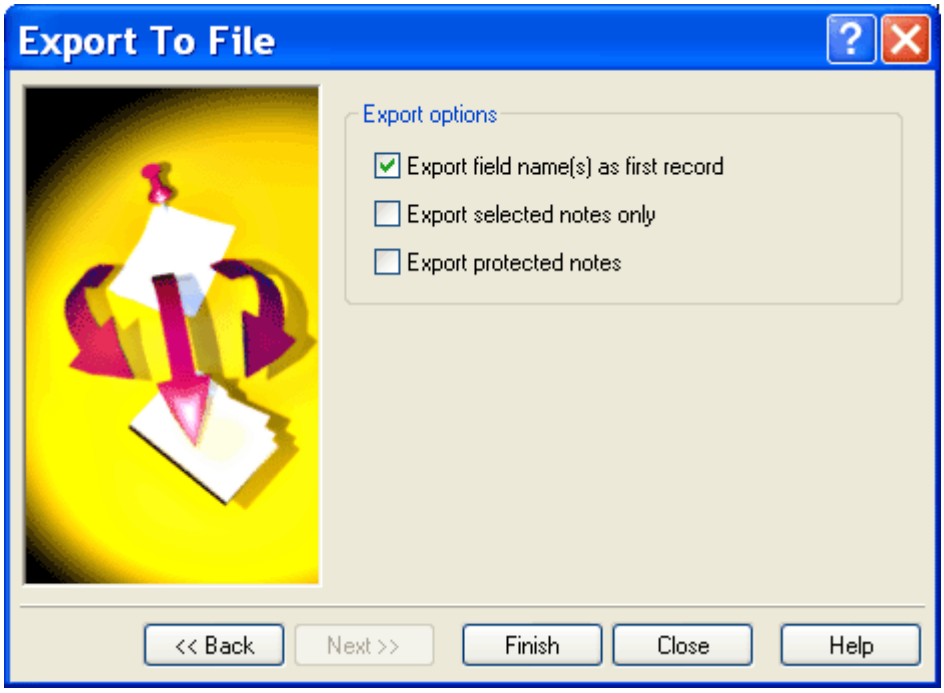

Figure 131. Export To File dialog box.

3. Check the **Export field name(s) in the first record** box to put the field names in the first record. If left unchecked, the field names are not exported to the file.
4. Check the **Export selected notes only** box to export selected notes only. If left unchecked, ALL the notes in the selected database are exported.
5. Check the **Export protected notes** box to export protected notes. If left unchecked, and you attempt to export a protected note, a blank notes file will be created. If checked, and you attempt to export a protected note, PhatNotes will ask you for the password.
6. After making all you choices, click **Finish**.

To export notes into Microsoft Outlook:

1. From the Wizard, choose Export to Microsoft Outlook, and click **Next** (see figure 132).

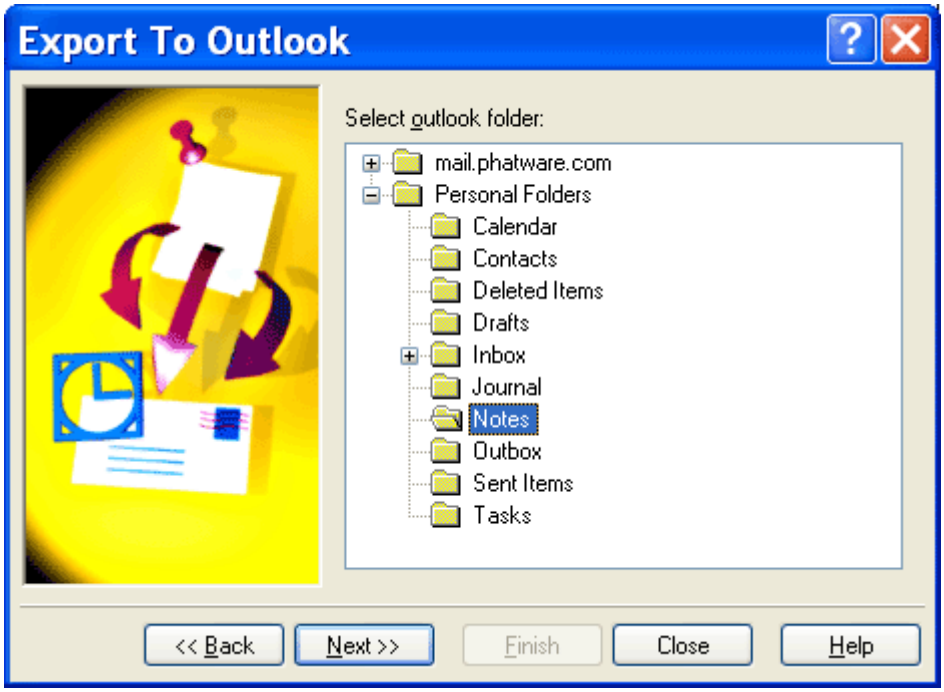

Figure 132. Export To Outlook dialog box.

2. Select the folder you want to export PhatNotes into. Click **Next**.

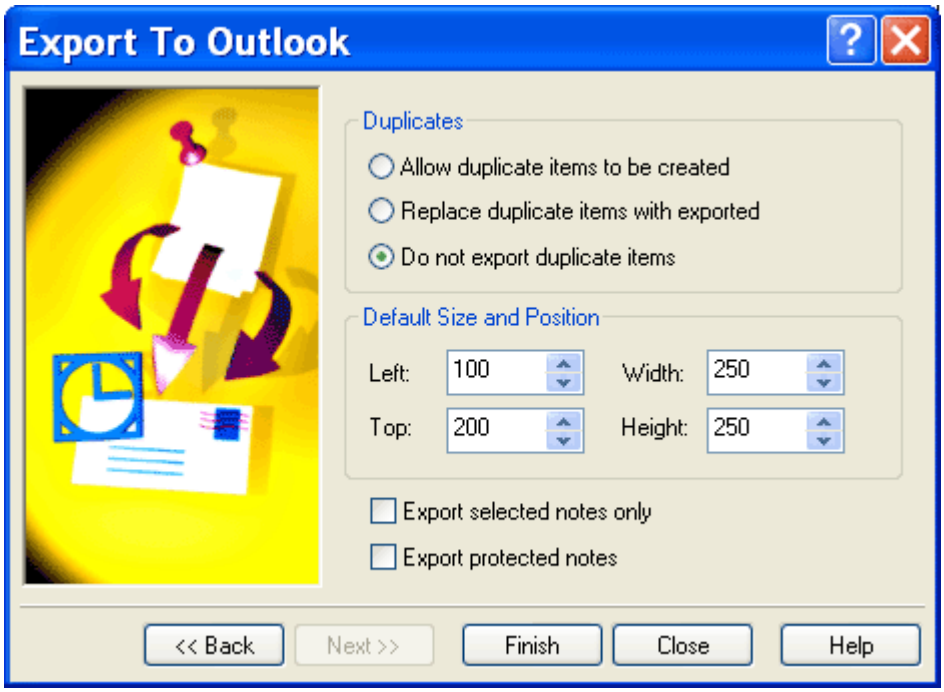

Figure 133. Export To Outlook dialog box.

3. Select how you want to deal with duplicate items.
4. Choose the size and position of the window Outlook will use to display your exported notes.
5. Check the **Export selected notes only** box to export selected notes only. If left unchecked, ALL the notes in the selected database are exported.
6. Check the **Export protected notes** box to export protected notes. If left unchecked, and you attempt to export a protected note, a blank notes file will be created. If checked, and you attempt to export a protected note, PhatNotes will ask you for the password.
7. Click **Finish**. The notes will now appear in Outlook.

To export notes to HTML

The **Import and Export Wizard** allows exporting a Notes database into a set of HTML files.

1. From the Wizard, choose Export to HTML File, and click **Next** (see figure 134).

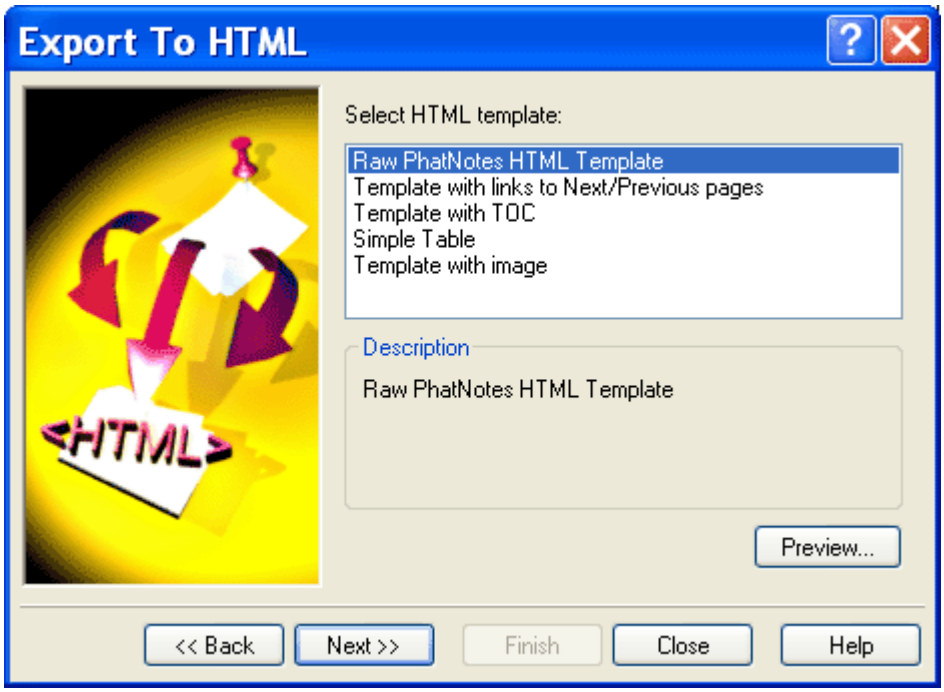

Figure 134. Export To HTML dialog box.

2. Select an HTML template. Templates are HTML files that use some PhatNotes-specific tags to specify how the Wizard should format the notes data. Some tags are used as placeholders for the exported notes properties; other tags create the navigation links and control how the Wizard generates and references Table of Contents files. The detailed description of the template tags in Appendix 4. Click on **Preview** to see how the template looks in a web browser. After a template is selected, click on **Next**.

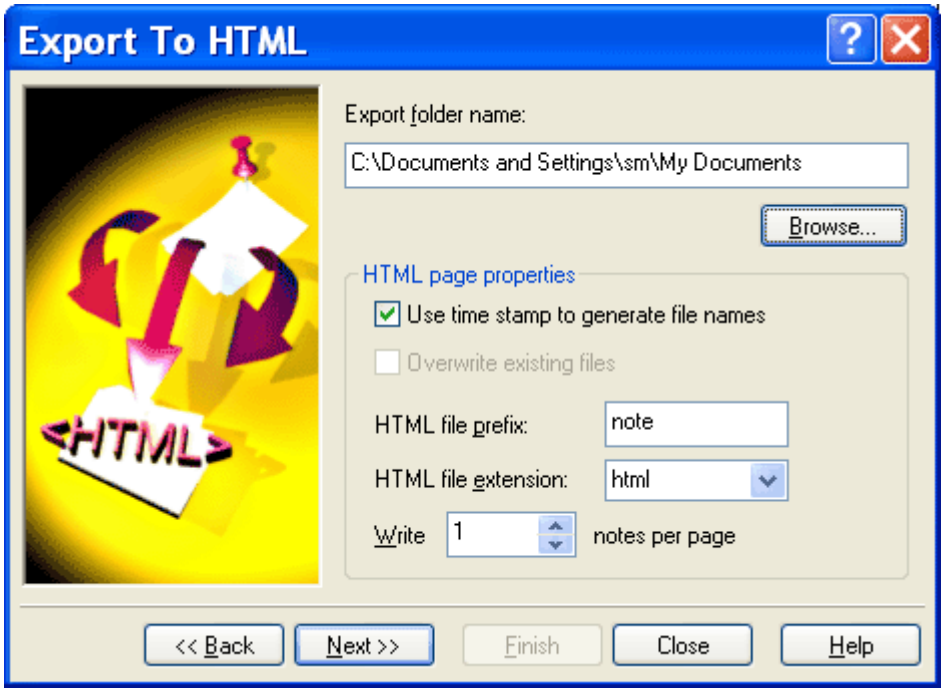

Figure 135. Export To HTML dialog box.

3. Specify the destination directory where the generated HTML files will be stored, and configure the rules to make files names. The following options are available:
    - *Use time stamp to generate file names* – if this option is selected the Wizard is using the current date and time to generate the unique file names. The file names will have the following format: [*prefix*]_ddmmyy_hhmmss_Page[n].[*extension*] where *prefix* is the text in the *HTML file prefix* box and *extension* is either htm or html, depending on the selection in the *HTML file extension* drop-down list. If this option is not selected, the format will be [*prefix*]_Page[n].[*extension*].
    - *Overwrite existing files* – this option is available only if the time stamp is not used to generate the names. If this option is selected the page numbers always start with 1 and any existing files with the matching names will be overwritten. If this option is not selected the Wizard checks the existing files and uses the first available number for the first page it generates.
    - **Write XXX notes per page** – this field specifies the number of notes each HTML file should have. By default this field shows the number of notes specified in the selected template (see the description of the *PhatNotes Number* tag in the Appendix), or if this tag is not present, the number used during the last session.
4. Click **Next**

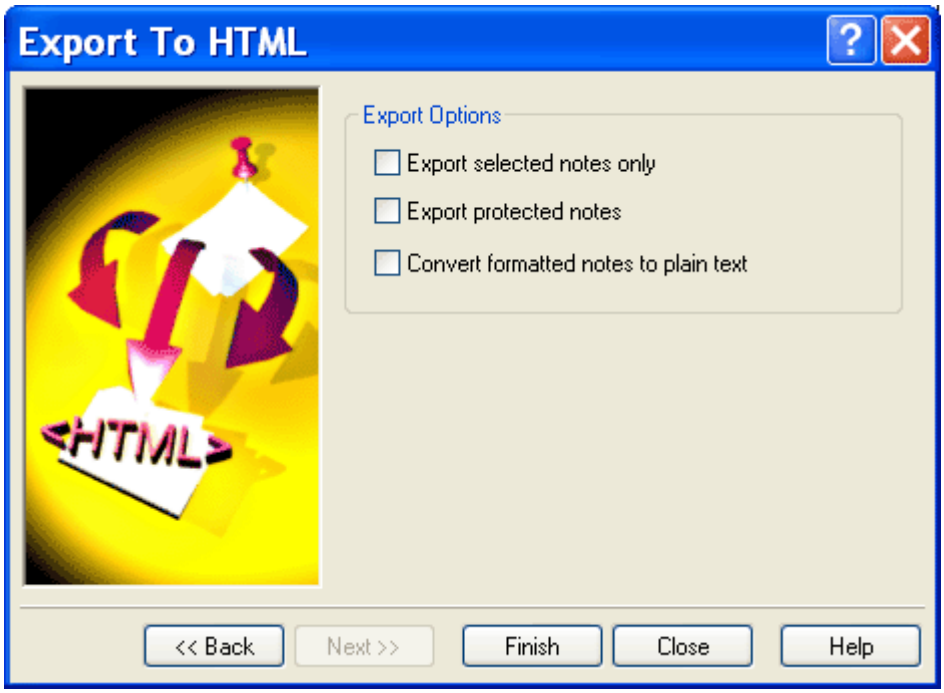

Figure 136. Export To HTML dialog box.

5. The *Export Options* group of check-boxes that appear on the next page of the wizard allow the control of the following parameters:
    - *Export selected notes only* – if checked, the Wizard exports only the selected notes; otherwise all the notes from the current database are exported.
    - *Export protected notes* – if checked, the Wizard exports the protected notes; otherwise the protected notes are ignored. When exporting a protected note, a dialog box appears prompting the user to enter a password for the note.

- *Convert formatted notes to plain text* – if checked, all existing formatting of the notes text is ignored.

6. Click **Finish**.

PhatNotes Reminder Utility

PhatNotes Reminder Utility is a program which handles user reminders. This program must be running to process user reminder. You can choose to run this program when Windows boots, only while PhatNotes is running, or start it manually. Depending of the options, when reminder goes off, the PhatNotes Reminder dialog box can be displayed, a sound can be played, a bell icon in the tray bar can be animated, and PhatNotes can be launched.

Reminder Options

You can set and change the reminder options two ways:

1. While in the Note Editor, choose the **Reminder** item from the **Insert** menu. The **Reminder** dialog box will appear. Click on the **Options** button. The **Reminder Options** dialog appears (see figure 137).

- or -

1. If the Notes Reminder bell icon is visible from the tray on the **Windows Taskbar**, double click on it to bring up the **Reminder Options** dialog.

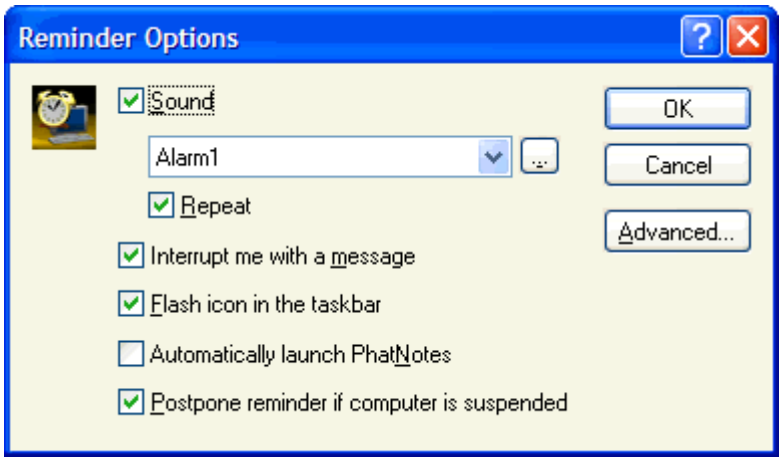

Figure 137. PhatNotes Reminder Options dialog box.

2. The options you select will determine how you will be notified, once a reminder goes off for any note that contains a notification
3. Click on the **Advanced** button to select when to run the Notifications Utility (see figure 138).

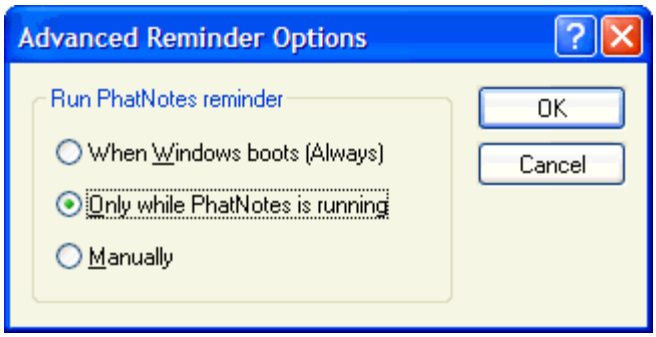

Figure 138. Advanced Reminder Options dialog box.

See the New Notes Settings section for setting default options.

Once a reminder occurs

Once a reminder goes off for any note that contains a reminder, the PhatNotes Reminder dialog will appear, unless the **Interrupt me with a message** box in the Reminder Options dialog box is not checked (see Figure 139). If specified, the Reminder icon will flash in the Windows taskbar and alarm will sound.

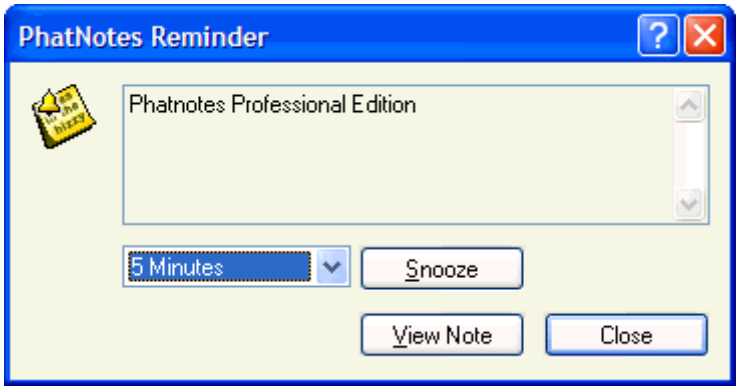

Figure 139. PhatNotes Reminder dialog box.

1. Click the **Snooze** button to display the reminder again to the amount of time you select in the drop-down window has passed.
2. Click the **View Note** button to close the dialog box and go to the note that is assigned to this reminder.

PhatNotes Settings

You can customize the PhatNotes view and the default settings by changing various parameters in the **Options** dialog box. To display the **Options** dialog box, choose **Tools/Options** command in the main menu. The **Options** dialog box contains six property sheets: **General**, **New Note**, **View Columns**, **Sort Notes**, **Autobackup**, and **Outlook Logon**.

General Options

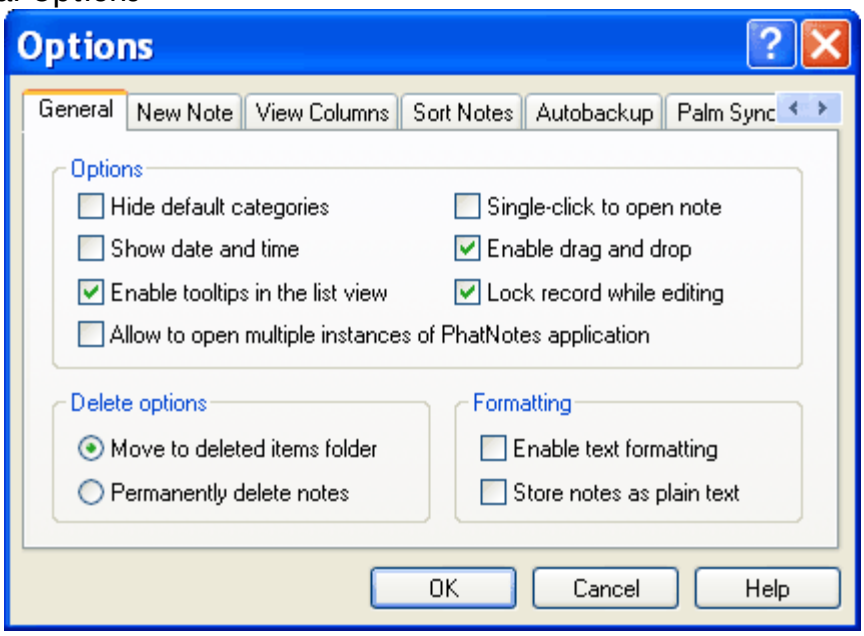

Figure 140. Options dialog box: General property sheet.

1. Switch to the **General** property sheet (see figure 140).
2. Check the **Hide default categories** box to remove the default document categories in the note editor's drop-down category list. If default categories are hidden, only categories that are used in the notes database will appear in the list.
3. Check the **Show date and time** box to show the time along with the date in the **Created** and **Modified** columns in the note list.
4. Check the **Enable tooltips in the list view** box if you want to show the details view cell data as a tooltip when the data does not fit the cell size.
5. Check the **Single-click to open note** box if you want to open notes for viewing or editing with a single mouse click in the Main Screen.
6. Check the **Enable drag and drop** box to enable Drag and Drop operations.
7. Check the **Lock record while editing** box to lock the note in the database while open in Note Editor, so another application cannot modify the note.
8. Check the **Move to deleted items folder** if you want the deleted notes to be moved to the Deleted Items Folder.
9. Check the **Permanently delete notes** option to delete notes permanently rather than moving them to the Delete Items Folder. If the option is selected, the Delete command cannot be undone.
10. Check the **Allow to open multiple instances of PhatNotes application** box if you want to open multiple instances of PhatNotes application on the desktop PC. If this box is not checked, you can only open a single instance of the application: an attempt to start PhatNotes again, will simply activate already running application.

11. Check the **Enable text formatting** box to be able to create formatted notes. See the "Formatting Text" section for more information. If this option is checked, all notes are stored in the database in **RTF** format.
12. If **Enable text formatting** box is not checked, you can check the **Store notes as plain text** box. In this case, any formatted notes (RTF) will be converted to plain text.

New Note Settings

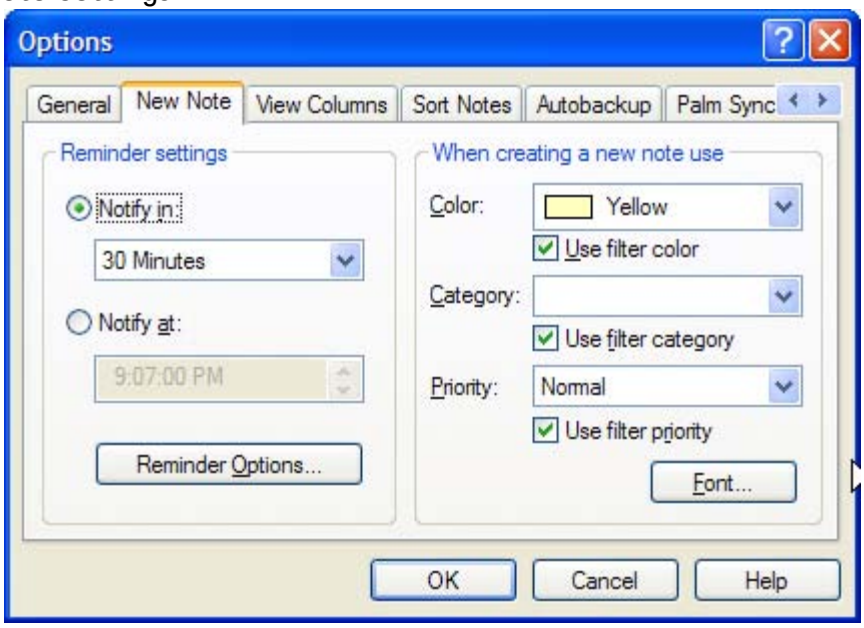

Figure 141. Options dialog box: New Note property sheet.

1. Switch to the **New Note** property sheet (see figure 141).
2. Use the **Default reminder time** group to specify the default reminder time. This time can be changed later when inserting a Reminder. See the "Inserting Reminder" section for more information.
    - To set the default time offset for the reminder, select **Notify in** and choose a time offset from the drop down menu below.
    - To set the default reminder time of the day, select **Notify at** and enter the time in the box below.
    - To change the reminder options, click on the **Reminder options** button. (See the "PhatNotes Reminder Utility" section for more information.)
3. Use the **When creating a new note use** group to specify the default color, category, and priority that will be used when a new note is created.
    - Select the default note's color from the **Color** drop down menu. Check the **Use filter color** box to use the current filter color instead. This option will work only if the color filter is used at the time a new note is created. See the "*Sorting and Filtering Notes*" section for more information.
    - Select the default note's category from the **Category** drop down menu. Check the **Use filter category** box to use the current filter category instead. This option will

work only if the category filter is used at the time a new note is created. See the "*Sorting and Filtering Notes*" section for more information.

- Select the default note's priority from the **Priority** drop down menu. Check the **Use filter priority** box to use the current filter's priority instead. This option will work only if the priority filter is used at the time a new note is created. See the "*Sorting and Filtering Notes*" section for more information.

4. Click on the **Font** button to set the default font for a new note.

View Columns

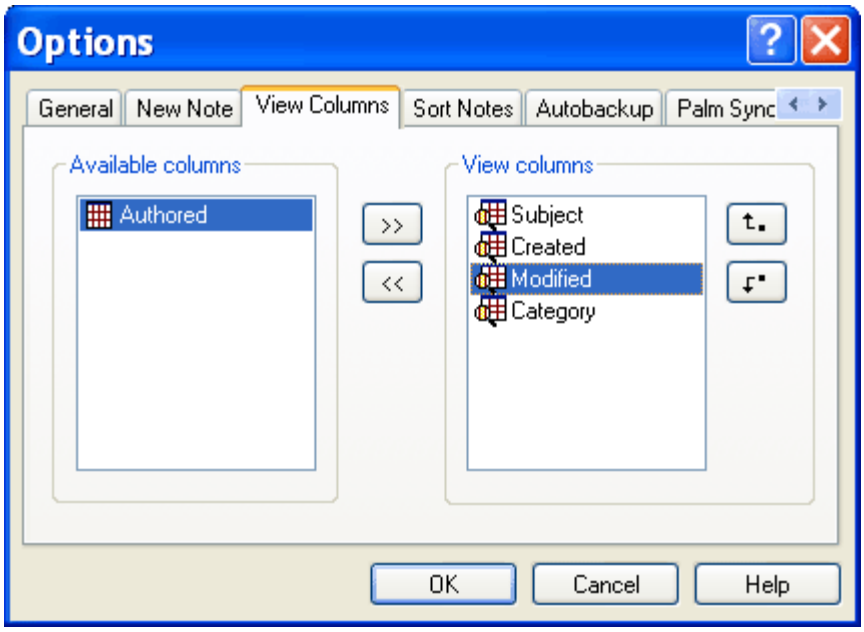

Figure 142. Options dialog box: View Columns property sheet.

1. To choose which columns to display in the notes list and in what order, switch to the **View columns** property sheet of the Options dialog box (see figure 142).
2. To add a column to the view list, select the desired column from the **Available column** list and press the **>>** button.
3. To remove a column from the view list, select the desired column in the **View columns** list and press the **<<** button.
4. To change the column order, select the column in the **View columns** list and press **Move up** or **Move down** button.

Sort Notes

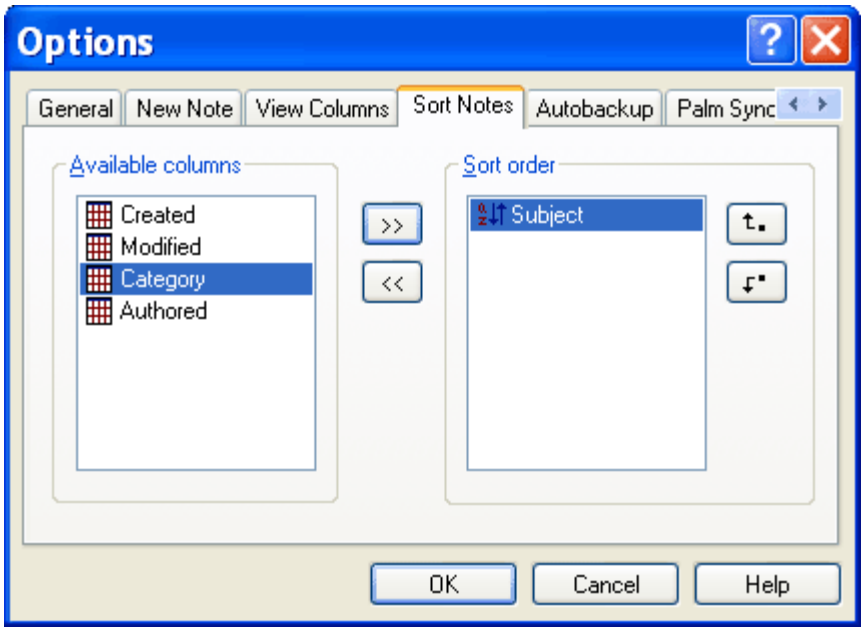

Figure 143. Options dialog box: Sort Notes property sheet.

1. To change the columns sort order, switch to the **Sort notes** property sheet of the **Options** dialog box (see figure 143). The **Sort notes** property sheet can be also used to sort by hidden columns.
2. To sort notes by a specific field, select the desired column from the **Available columns** list and press the **>>** button.
3. To remove a column from the Sort Order list, select the desired column in the **Sort order** list and press the **<<** button.
4. The order of columns in the **Sort order** list defines the order in which the columns are used for sorting. To change the order use the Up/Down buttons.

> **Note**: You can also sort by clicking on the desired column's header in the list view. See the "Sorting and Filtering Notes" section for more information.

Autobackup

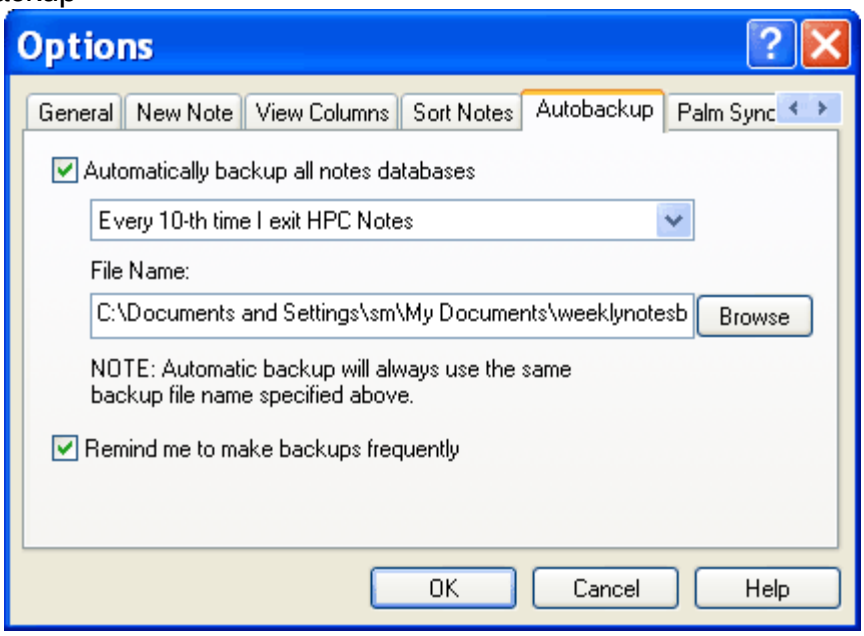

Figure 144. Options dialog box: Autobackup property sheet.

Use this page to configure Autobackup settings.

1. Switch to the **Autobackup** property sheet (see figure 144).
2. To enable autobackup, check the **Automatically backup all notes databases** checkbox.

   Select the frequency of the backups from the drop-down menu.

   Type or browse for the filename of the backup file.
3. If you do not want automatic backups, but want to be reminded to backup your notes every 10 days, check the **Remind me to make backups frequently** checkbox. The backup message will **not** appear if autobackup is enabled.

Palm Sync

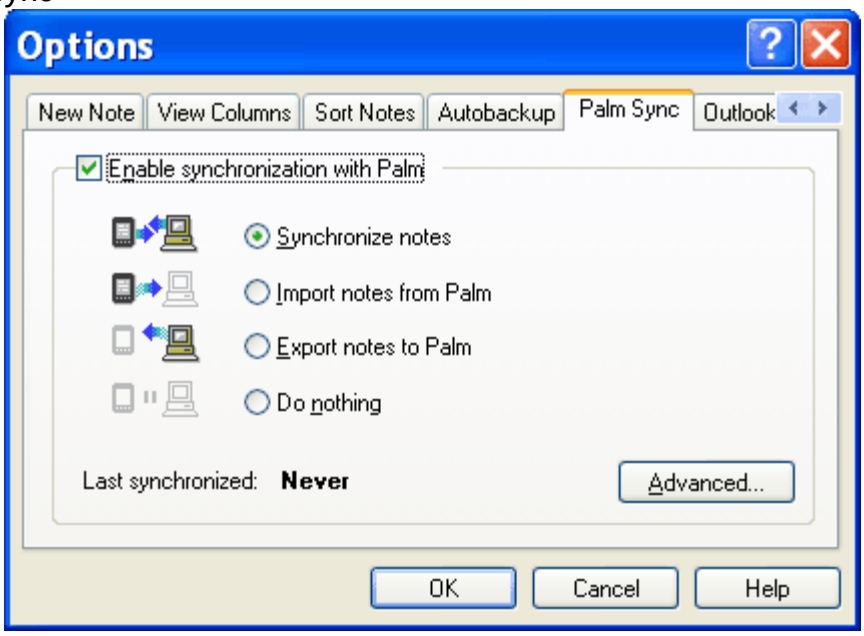

Figure 145. Options dialog box: Palm Sync property sheet.

Use this page to configure PhatNotes synchronization with Palm OS powered devices. The **Palm Sync** property sheet will appear in the **Options** dialog box only if PhatNotes conduit for Palm is installed. The conduit requires Palm Desktop software version 4.0 or later.

1. Switch to the **Palm Sync** property sheet (see figure 145).
2. To enable notes synchronization between the desktop PC and the Palm device, check the **Enable Synchronization with Palm** checkbox. Please note that the **HotSync** manager must be restarted on your desktop PC, before PhatNotes conduit will be enabled or disabled. If the state of this box has changed, PhatNotes will prompt you to restart HotSync after you click the **OK** button.
3. Select the **Synchronize notes** option to enable synchronization between PhatNotes and the Palm device.
4. Select the **Import notes from Palm** option to import notes from Palm into the active notes database, replacing all existing notes.
5. Select the **Export notes to Palm** to export notes from the PhatNotes to Palm replacing all existing notes.
6. Select the **Do Nothing** option to disable PhatNotes synchronization.
7. Click on the **Advanced** button to set advanced Import and Export options (see figure 146).

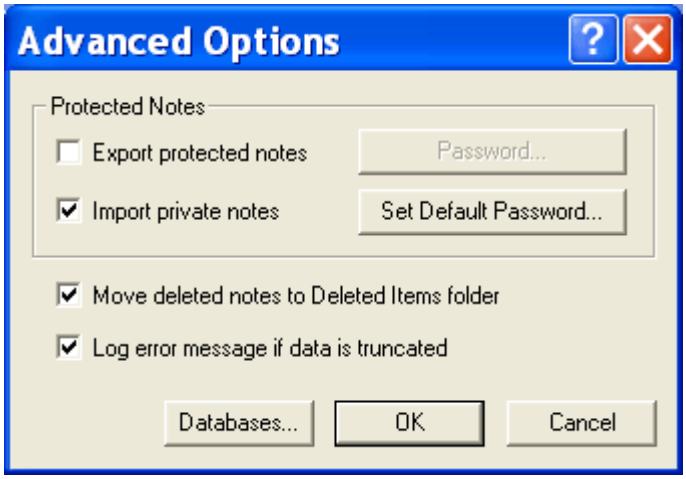

Figure 146. Advanced Options dialog box: Palm Sync property sheet.

Select whether to import and/or export protected and private notes.

Check the **Move deleted notes to Deleted Items folder** checkbox to move deleted notes to the PhatNotes Deleted Items folder (note that each database has a separate *Deleted Items* folder).If unchecked, these notes will be permanently deleted.

To create a standard HotSync error log if any data is truncated, check the **Log error message if data is truncated** checkbox.

Notes: If you use IntelliSync, the PhatNotes conduit may become disabled after changing IntelliSync synchronization settings. If that occurs, use this dialog box to enable the PhatNotes conduit. After enabling or disabling the PhatNotes conduit, you must restart the HotSync manager for changes to take effect.

Outlook Logon

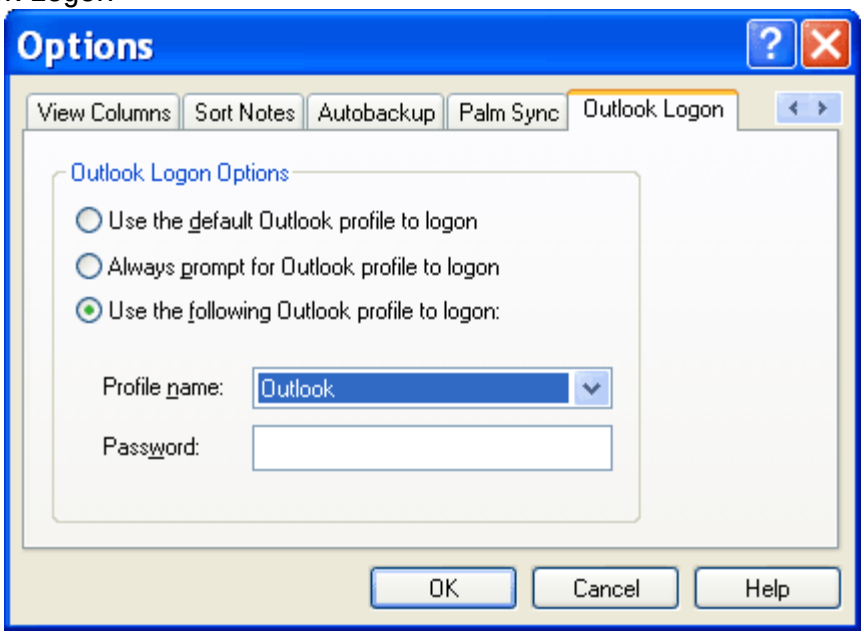

Figure 147. Options dialog box: Outlook Logon property sheet.

Use this page to choose a user logon profile to access Microsoft Outlook personal folders. This profile is used to access personal folders when performing an import or an export operation. It may be useful if you have more than one user profile with different folders and settings.

1. Switch to the **Outlook Logon** property sheet (see figure 147).
2. Select the **Use the default Outlook profile to logon** option to use the default Outlook logon profile to access Outlook personal folders when importing or exporting notes.
3. Select the **Always prompt for Outlook profile to logon** option to be able to choose a logon profile every time when accessing Outlook personal folders. (You must have more then one Outlook logon profile).
4. Select the **Use the following Outlook profile to logon** to choose a logon profile that will be used every time when you access Outlook personal folders. If this option is selected, you then choose a logon profile in the **Profile name** box to access Outlook personal folders. You will need to enter the password for the selected logon profile, if any.

Additional View Options

- To view or hide the toolbar, status bar, and/or shortcut bar, check the appropriate item from the **View** menu.
- To view or hide the note preview, use the **Note Preview** item from the **View** menu. Enabling the Note Preview shows the entire note in view-only mode.

All settings, including column width, font name and size, etc., will be saved when you quit PhatNotes, and will be used when you run the program again.

Microsoft IntelliMouse and Keyboard Pro Support

PhatNotes provides support for some special features of the Microsoft *IntelliMouse*, *Internet Keyboard*, *Internet Keyboard Pro*, and *Natural Keyboard Pro*.

Microsoft IntelliMouse

1. Use the **Scrolling Wheel** to scroll the notes list and text in the note editor and preview pane.
2. Use the **Navigation Buttons** (not available on all IntelliMouse devices) to navigate notes.
    - If the PhatNotes main window is active, the Navigation Buttons will select the previous (back button) or the next (forward button) note in the notes list.
    - If the Note Editor dialog is active, the Navigation Buttons will act as View/Previous Note (back button) and View/Next Note (forward button) menu commands.

Microsoft Internet (Natural) Keyboard Pro

PhatNotes supports the following Internet navigation buttons:

1. **Back** button
    - If the PhatNotes main window is active, this button selects the previous note in the notes list.
    - If the Note Editor dialog is active, it loads the previous note into the editor.
2. **Forward** button
    - If the PhatNotes main window is active, this button selects the next note in the notes list.
    - If the Note Editor dialog is active, it loads the next note into the editor.
3. **Stop** button
    - If the PhatNotes main window is active, this button closes this dialog box.
    - If the Note Editor dialog is active, it exits the program.
4. **Refresh** button
    - Refreshes the notes list in the PhatNotes main window.

Note: This functionality requires that Microsoft Internet Keyboard and Microsoft IntelliMouse devices are properly installed and configured on your system. It may not be available on all supported operating systems.

Appendices

Appendix 1. Keyboard Shortcuts

The following table shows all keyboard shortcuts you can use while working with the PhatNotes main screen.

Main Window Hot Keys

Keyboard Shortcut	Menu Item	Operation Performed
Ctrl+0	Tools/Organize Notes/ Disable	Disable hierarchical notes organizer (default notes view)
Alt+0	View/Details	Displays notes in the Notes List View Pane showing details such as subject, created and modified dates, and category
Ctrl+1	Tools/Organize Notes/ By Creation Date	Organizes notes by the Creation Date
Alt+1	View/Large Icons	Displays notes in the Notes List View Pane using large icons
Ctrl+2	Tools/Organize Notes/ By Modification Date	Organizes notes by the Modification Date
Alt+2	View/Small Icons	Displays notes in the Notes List View Pane using small icons
Ctrl+3	Tools/Organize Notes/ By Category	Organizes notes by the Category
Alt+3	View/List	Displays notes in the Notes List View Pane as a list
Ctrl+4	Tools/Organize Notes/ By Color	Organizes notes by the Color
Ctrl+5	Tools/Organize Notes/ By Priority	Organizes notes by the Priority
Ctrl+A	View/Sort Ascending	Sets ascending sort order in the header selected
Ctrl+B	View/Sort Descending	Sets descending sort order in the header

Keyboard Shortcut	Menu Item	Operation Performed
		selected
Ctrl+C	Edit/Copy	Copies the selected note to the clipboard
Ctrl+Alt+C	Tools/Organize Notes/ Collapse All	Collapses all notes groups (not available if hierarchical notes organizer is disabled)
Ctrl+D	View/Arrange Notes/ by creation date	Sorts notes by creation date
Ctrl+Alt+E	Tools/Organize Notes/ Expand All	Expands all notes groups (not available if hierarchical notes organizer is disabled)
Ctrl+F	Edit/Find	Finds note
Ctrl+G	Edit/Create Copy	Creates a copy of the selected note
Ctrl+J	Desktop: Edit/ Find Next	Finds next note
Ctrl+K	File/Database/Copy Notes	Copies or moves one or more selected notes to another database
Ctrl+M	View/Arrange Notes/ by Modification Date	Sorts notes by modification date
Alt+M	File/Send Mail	Sends the selected note as an email
Ctrl+N	Edit/New Note	Creates a new note
Ctrl+O	File/Database/Open	Opens a notes database
Ctrl+Q		Exits the application

Keyboard Shortcut	Menu Item	Operation Performed
Ctrl+R	Insert/Reminder	Displays the reminder dialog box
Alt+R	File/Receive	Receives one or more notes from Infrared port
Alt+S	File/Send	Sends one or more selected notes via Infrared port
Ctrl+S	View/Arrange Notes/ by Subject	Sorts notes by subject
Ctrl+T	View/Arrange Notes/ by Category	Sorts notes by category
Ctrl+V	Edit/Paste	Insets the clipboard contents
Ctrl+X	Edit/Cut	Removes the selected note and adds it to the clipboard
Ctrl+Z	Edit/Undo	Undoes the last action
Shift+F3	Tools/Filter	Displays the Filter dialog box
F1	Help/Help Contents	Displays the PhatNotes help contents
Shift+F1	Help/Context Help	Displays help for clicked-on item
F4	View/Statistics	Shows statistics about the selected note
F5	View/Refresh	Reloads the database and refreshes the notes list
Enter	Edit/Edit Note	Edits the selected note
Delete	Edit/Delete Note	Deletes the selected note

Note Editor Hot Keys

Keyboard Shortcut	Menu Item	Operation Performed
Ctrl+1		Left-justifies the selected paragraph(s)
Ctrl+2		Center-justifies the selected paragraph(s)
Ctrl+3		Right-justifies the selected paragraph(s)
Ctrl+7 / F7	Spelling/Check Spelling	Starts spelling check
Ctrl+A	Edit/Select All	Selects the entire document
Ctrl+B		Makes the selection bold (toggle)
Ctrl+C	Edit/Copy	Copies selected text to the clipboard
Ctrl+D	Insert/Date & Time	Inserts current date and time
Ctrl+F	Edit/Find	Finds text inside the note's body
Ctrl+G	Edit/CalliGrapher	Runs CalliGrapher
Ctrl+I		Makes the selection italic (toggle)
Ctrl+J	Edit/Search/Find Next	Finds next text
Alt+M	File/Send Mail	Sends the note as an email
Ctrl+N	File/New Note	Creates a new note
Ctrl+O	File/Import	Imports a text file
Alt+P	Format/Paragraph	Formats the current or selected paragraph(s)
Ctrl+P	File/Print	Prints the current note
Ctrl+S	File/Save	Saves the current note in the database

Keyboard Shortcut	Menu Item	Operation Performed
Ctrl+Shift+S	File/Export	Exports the current note as a text file
Ctrl+T	Format/Tabs	Displays Tabs dialog box
Alt+T	Format/Font	Displays Font dialog box
Ctrl+V	Edit/Paste	Inserts the clipboard contents
Ctrl+U		Formats the selection with the continuous underline (toggle)
Ctrl+Z	Edit/Undo	Undoes the last editing action
Ctrl+X	Edit/Cut	Cuts selected text to the clipboard
View+Right Arrow	Edit/Next Note	Displays the next note
View+Left Arrow	Edit/Previous Note	Displays the previous note
F4	View/Statistics	Shows statistics about the note
Escape	File/Close	Closes the note without saving
Alt+Enter		Saves modifications and closes note editor

Appendix 2. Synchronization Troubleshooting Guide

Problem	Cause	Solution
"*Combine/Discard required on the desktop computer*" message appears on the Pocket PC after installing PhatNotes.	Pocket PC is connected to the Desktop PC using **Ethernet** or **Dial-Up** connection, which prevents Combine/Discard dialog box to appear on the Desktop PC.	After installing PhatNotes, you must connect for the first time using either the **Serial** or **Infrared** port. ActiveSync will display the Combine/Discard dialog box. Click the **Combine** or **Discard** button and synchronize all data. Then you can switch back to use either the Ethernet or Dial-Up connection.
After deleting a notes database an empty databases remains on the desktop (device).	ActiveSync failed to delete the old database during synchronization, because it was in use by PhatNotes or another program.	Make sure that the old database is not in use then delete it manually.
After renaming a notes database an empty database with the old name created on the desktop (device).	ActiveSync failed to delete the old database during synchronization, because it was in use by PhatNotes or another program.	Make sure that the old database is not in use then delete it manually.
Unable to synchronize notes after installation. Error message saying that PhatNotes services are not installed on the desktop PC appears.	You have an older version of ActiveSync 2.0 or 2.1 and have not deleted the synchronization profile after installing PhatNotes.	Delete the existing synchronization profile and create a new one as described in the Installation section.
	PhatNotes synchronization module is not properly installed on your desktop PC.	1. Disconnect Pocket PC. 2. Uninstall PhatNotes from your desktop PC. 3. Reboot Desktop PC. 4. Install desktop portion of PhatNotes. 5. Connect your Pocket PC.
Unable to synchronize notes after installation. Error message saying that	Pocket PC portion of PhatNotes is not installed or not properly registered.	1. Disconnect your Pocket PC from the desktop PC, if connected. 2. Uninstall PhatNotes from Pocket PC if installed. See Removing PhatNotes

Problem	Cause	Solution
PhatNotes services are not installed on the Pocket PC appears.		section. 3. Connect Pocket PC to the desktop PC. 4. Install the Pocket PC portions on PhatNotes by executing the installation batch file from Start->Programs->PhatNotes Tools ->Install PhatNotes on Pocket PC. 5. Reconnect Pocket PC for changes to take effect.

Appendix 3. Syntax of regular expressions

This appendix describes the regular expression syntax used PhatNotes.

A regular expression is a pattern of text that consists of ordinary characters (for example, letters a through z) and special characters, known as *meta-characters*. The pattern describes one or more strings to match when searching text.

Here are some examples of regular expressions:

Expression	**Matches**
^\s*$	Match a blank line.
\d{2}-\d{5}	Validate an ID number consisting of 2 digits, a hyphen, and an additional 5 digits.
<\s*(\S+)(\s[^>]*)?>[\s\S]*<\s*\/\1\s*>	Match an HTML tag.

The following table contains the complete list of meta-characters and their behavior in the context of regular expressions:

Character	**Description**
\	Marks the next character as a special character, a literal, a back reference, or an octal escape. For example, 'n' matches the character "n". '\n' matches a new line character. The sequence '\\' matches "\" and "\(" matches "(".
^	Matches the position at the beginning of the input string. In the body field ^ also matches the position following '\n' or '\r'.
$	Matches the position at the end of the input string. In the body field $ also matches the position preceding '\n' or '\r'.
*	Matches the preceding character or sub-expression zero or more times. For example, zo* matches "z" and "zoo". * is equivalent to {0,}.
+	Matches the preceding character or sub-expression one or more times. For example, 'zo+' matches "zo" and "zoo", but not "z". + is equivalent to {1,}.
?	Matches the preceding character or sub-expression zero or one time. For example, "do(es)?" matches the "do" in "do" or "does". ? is equivalent to {0,1}
{*n*}	*n* is a nonnegative integer. Matches exactly *n* times. For example, 'o{2}' does not match the 'o' in "Bob," but matches the two o's in "food".
{*n*,}	*n* is a nonnegative integer. Matches at least *n* times. For example, 'o{2,}' does not match the "o" in "Bob" and matches all the o's in "foooood". 'o{1,}' is equivalent to 'o+'. 'o{0,}' is equivalent to 'o*'.
{*n*,*m*}	*M* and *n* are nonnegative integers, where *n* <= *m*. Matches at least *n* and at most *m*

times. For example, "o{1,3}" matches the first three o's in "fooooood". 'o{0,1}' is equivalent to 'o?'. Note that you cannot put a space between the comma and the numbers.

? When this character immediately follows any of the other quantifiers (*, +, ?, {*n*}, {*n*,}, {*n*,*m*}), the matching pattern is non-greedy. A non-greedy pattern matches as little of the searched string as possible, whereas the default greedy pattern matches as much of the searched string as possible. For example, in the string "oooo", 'o+?' matches a single "o", while 'o+' matches all 'o's.

. Matches any single character except "\n". To match any character including the '\n', use a pattern such as '[\s\S]'.

(*pattern*) A sub-expression that matches *pattern* and captures the match. The captured match can be retrieved from the resulting Matches collection using the **$0**…**$9** properties. To match parentheses characters ( ), use '\(' or '\)'.

(?:*pattern*) A sub-expression that matches *pattern* but does not capture the match, that is, it is a non-capturing match that is not stored for possible later use. This is useful for combining parts of a pattern with the "or" character (|). For example, 'industr(?:y|ies) is a more economical expression than 'industry|industries'.

(?=*pattern*) A sub-expression that performs a positive lookahead search, which matches the string at any point where a string matching *pattern* begins. This is a non-capturing match, that is, the match is not captured for possible later use. For example 'Windows (?=95|98|NT|2000)' matches "Windows" in "Windows 2000" but not "Windows" in "Windows 3.1". Lookaheads do not consume characters, that is, after a match occurs, the search for the next match begins immediately following the last match, not after the characters that comprised the lookahead.

(?!*pattern*) A sub-expression that performs a negative lookahead search, which matches the search string at any point where a string not matching *pattern* begins. This is a non-capturing match, that is, the match is not captured for possible later use. For example 'Windows (?!95|98|NT|2000)' matches "Windows" in "Windows 3.1" but does not match "Windows" in "Windows 2000". Lookaheads do not consume characters, that is, after a match occurs, the search for the next match begins immediately following the last match, not after the characters that comprised the lookahead.

x|*y* Matches either *x* or *y*. For example, 'z|food' matches "z" or "food". '(z|f)ood' matches "zood" or "food".

[*xyz*] A character set. Matches any one of the enclosed characters. For example, '[abc]' matches the 'a' in "plain".

[^*xyz*] A negative character set. Matches any character not enclosed. For example, '[^abc]' matches the 'p' in "plain".

[*a*-*z*] A range of characters. Matches any character in the specified range. For example, '[a-z]' matches any lowercase alphabetic character in the range 'a' through 'z'.

[^*a*-*z*] A negative range characters. Matches any character not in the specified range. For example, '[^a-z]' matches any character not in the range 'a' through 'z'.

\b Matches a word boundary, that is, the position between a word and a space. For example, 'er\b' matches the 'er' in "never" but not the 'er' in "verb".

\B	Matches a non-word boundary. 'er\B' matches the 'er' in "verb" but not the 'er' in "never".
\c*x*	Matches the control character indicated by *x*. For example, \cM matches a Control-M or carriage return character. The value of *x* must be in the range of A-Z or a-z. If not, c is assumed to be a literal 'c' character.
\d	Matches a digit character. Equivalent to [0-9].
\D	Matches a non-digit character. Equivalent to [^0-9].
\f	Matches a form-feed character. Equivalent to \x0c and \cL.
\n	Matches a new line character. Equivalent to \x0a and \cJ.
\r	Matches a carriage return character. Equivalent to \x0d and \cM.
\s	Matches any white space character including space, tab, form-feed, and so on. Equivalent to [\f\n\r\t\v].
\S	Matches any non-white space character. Equivalent to [^ \f\n\r\t\v].
\t	Matches a tab character. Equivalent to \x09 and \cI.
\v	Matches a vertical tab character. Equivalent to \x0b and \cK.
\w	Matches any word character including underscore. Equivalent to '[A-Za-z0-9_]'.
\W	Matches any non-word character. Equivalent to '[^A-Za-z0-9_]'.
\x*n*	Matches *n*, where *n* is a hexadecimal escape value. Hexadecimal escape values must be exactly two digits long. For example, '\x41' matches "A". '\x041' is equivalent to '\x04' & "1". Allows ASCII codes to be used in regular expressions.
num	Matches *num*, where *num* is a positive integer. A reference back to captured matches. For example, '(.)\1' matches two consecutive identical characters.
n	Identifies either an octal escape value or a back reference. If *n* is preceded by at least *n* captured sub expressions, *n* is a back reference. Otherwise, *n* is an octal escape value if *n* is an octal digit (0-7).
nm	Identifies either an octal escape value or a back reference. If *nm* is preceded by at least *nm* captured sub-expressions, *nm* is a back reference. If *nm* is preceded by at least *n* captures, *n* is a back reference followed by literal *m*. If neither of the preceding conditions exists, *nm* matches octal escape value *nm* when *n* and *m* are octal digits (0-7).
nml	Matches octal escape value *nml* when *n* is an octal digit (0-3) and *m* and *l* are octal digits (0-7).
\u*n*	Matches *n*, where *n* is a Unicode character expressed as four hexadecimal digits. For example, \u00A9 matches the copyright symbol (©).

Appendix 4. Creating your own HTML templates

PhatNotes HTML export template is a standard HTML file with some extra tags added to control the export. All of the standard HTML tags can be used and they are transferred unchanged into the resulting files. You can create templates for PhatNotes with any HTML editor.

Here is an example of a typical HTML export template file:

<html>

<head>

"meta" tags specifying template name, description, table of contents, and recommended number of notes per page for this template.

</head>

heading section – standard HTML-formatted data that will precede the exported notes data. This section can optionally include the navigation tags (<hpc_nextpage$>, <hpc_prevpage$>, and <hpc_tocref$>

<hpcnote$>

standard HTML-formatted data with inserted notes properties tags – this section will be repeated for each of the exported notes

</hpcnote$>

footer section – standard HTML-formatted data that will appear once at the end of each of the generated files. This section can optionally include the navigation tags (<hpc_nextpage$>, <hpc_prevpage$>, and <hpc_tocref$>

<html>

To add a new template to PhatNotes, simply copy the new HTML template including any images and additional files (the template can contain multiple HTML files) into the **<PhatNotes>\Templates** folder on your desktop PC, where <PhatNotes> is the folder in which PhatNotes (winnotes.exe) is installed. The next section contains the detailed information about PhatNotes HTML Template Tags.

Meta tags

PhatNotes meta tags are used to specify the template name and description that appear in the wizard when selecting a template. When the wizard enumerates the existing templates, it ignores the HTML files that do not have at least one of these two tags. In addition to these tags, two more tags can be used in order to specify the recommended number of notes on each page generated from the template and to define a template file for the table of contents.

HPC Name

The tag specifies the name that appears in the list of templates in the Wizard. If this tag is not present, the Wizard shows the file name as a template name.

The tag has the following format:
<meta name="HPC Name" content="*[template name]***">**.

For example:
<meta name="HPC Name" content="Simple list template">

HPC Description

The tag specifies the description that will appears in the *Description* box when the template is selected from the list. If this tag is not present the *Description* box shows "HTML template description is not available."

The tag has the following format:
<meta name="HPC Description" content="*[template description]***" >**.

For example:
<meta name="HPC Description" content="Simple list template">

HPC TOC

This tag is optional and specifies the file that should be used as a template to generate the *Table of Contents* (TOC) page for the exported notes. TOC template file is a normal HTML file with a **<hpc_toc$>** tag inserted in the position where the list of links to the exported notes should appear. Table of contents is saved as a separate file and contains a list of links to all of the exported notes; the wizard uses the notes subject fields as links text. The following format is used to generate the TOC file name: [*prefix*]_ddmmyy_hhmmss_TOC.[*extension*] (the time stamp part is present only if the *Use time stamp to generate file names* option is selected).

The tag has the following format:
<meta name="HPC TOC" content="*[TOC file name]***" >**.

For example:
<meta name="HPC TOC" content="toc.htm">

PhatNotes Number

This tag is optional and can be used to specify the recommended number of notes written to each of the generated HTML pages. The Wizard uses this number as a default value, and when required it can be manually changed in the **Write XXX notes per page** field.

The tag has the following format:
<meta name="PhatNotes Number" content="*[number of notes per page]***" >**.

For example:
<meta name="PhatNotes Number" content="5">

Note Tags

<hpcnote$>

This tag indicates the beginning of the section that will be repeated for each of the exported notes. The tag is mandatory and can appear only once within one template. The closing tag (**</hpcnote$>**) has to be used to mark the end of this section. Any of the tags that represent the notes fields (i.e. subject$, category$, color$, priority$, created$, modified$, authored$, notebody$) can appear only between **<hpcnote$>** and **</hpcnote$>** tags; otherwise they are ignored.

<subject$>

Inserts the note subject text. Can be followed by the optional **</subject$>** tag.

<category$>

Inserts the note category. Can be followed by the optional **</category$>** tag.

<color$>

Inserts the note color as text. Can be followed by the optional **</color$>** tag.

<priority$>

Inserts the note priority [Low,High,Normal]. Can be followed by the optional **</priority$>** tag.

<created$>

Inserts the note creation date and time. Can be followed by the optional **</created$>** tag.

<modified$>

Inserts the note modification date and time. Can be followed by the optional **</modified$>** tag.

<authored$>

Inserts the note authoring date and time. Can be followed by the optional **</authored$>** tag.

<notebody$>

Inserts the note text. Can be followed by the optional **</notebody$>** tag.

Navigation Tags

Navigation tags are used for cross-references between the generated HTML pages. Navigation tags can appear either before the **<hpcnote$>** tag or after the **<hpcnote$>** tag.

<hpc_nextpage$>

Inserts a reference to the next HTML file that is generated during the same export operation.

The tag has the following format:
<hpc_nextpage$>***text***</hpc_nextpage$>

For example:
<hpc_nextpage$>***Next note***</hpc_nextpage$>

<hpc_prevpage$>

Inserts a reference to the previous HTML file that is generated during the same export operation.

The tag has the following format:
<hpc_prevpage$>***text***</hpc_prevpage$>

For example:
<hpc_prevpage $>***Previous note***</hpc_prevpage$>

<hpc_tocref$>

Inserts a reference to the *Table of Contents* file. You need to use this tag in conjunction with the "**HPC TOC**" meta tag.

The tag has the following format:
<hpc_tocref$>***text***</hpc_tocref$>

For example:
<hpc_tocref$>***Contents***</hpc_tocref$>